Department Store Sales

FAIRCHILD FACT FILE

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E. B. Gold, Manager
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DEPARTMENT STORE SALES

INTRODUCTION

This report summarizes the number of stores operated and sales in 1982 (or nearest fiscal period) for traditional department store organizations (as well as a limited number of specialty stores), listed by buying headquarter location. Branch store locations are included only where sales estimates are available.

Stores are listed by state and city within the four major geographic regions: Northeast, Nort Central, South and West. Listings of stores, store groups or divisions with a volume of $50 million or more and of chain and conglomerate organizations are also included in this report.

The sales figures are reported by the stores or in many cases are estimates believed to be reasonably accurate. Sources include the editorial staffs of *Women's Wear Daily* and other Fairchild trade papers, Dun and Bradstreet and other trade sources.

The Standard Industrial Classification (SIC) Manual defines department stores as establishments normally employing 25 people or more, having sales of apparel and soft goods combined amounting to 20 percent or more of total sales, and selling each of the following lines of merchandise:

1. Furniture, home furnishings, appliances, radio and TV sets
2. A general line of apparel for the family
3. Household linens and dry goods

To qualify as a department store, sales of each of the above listed lines must be less than 80 percent of total sales. An establishment with total sales of $10 million or more is classified as a department store even if sales of one of the merchandise lines listed above exceeds the maximum percent of total sales, provided that the combined sales of the other two groups are $1 million or more. Relatively few stores are included in this classification as a result of this special rule and most of those which are would otherwise have been classified in the apparel group.

To an increasing extent, however, department stores are diversifying their activities, opening specialty store units, off-price outlets, etc., or becoming part of conglomerate operations active in a number of different types of businesses. This has, of course, added to the difficulty of isolating department store volume from consolidated sales data.

NOTE: This report includes only those stores for which sales data, believed to be reasonably accurate, are available. The sales estimates reported may differ markedly from estimates reported for previous years. This may be due, however, not to an actual gain or loss in volume of the magnitude indicated but to differences in the compilation of estimates. Since revisions in earlier estimates may be in order, year-to-year comparisons in sales figures are not recommended.

Fairchild Market Research Division
Audrey S. Balchen, Director

SUMMARY OF AVAILABLE SALES FIGURES FOR
DEPARTMENT STORES, 1982*
BY REGION

NORTHEAST	Approx. Sales (Millions of $)
CONNECTICUT	
Bridgeport	
D. M. Read Inc. (Allied Stores, New York, N.Y.) (5 Conn. stores)	$ 70.0
Hartford	
G. Fox & Co. (May Dept. Stores, St. Louis, Mo.) (8 stores: Conn. 6, Mass. 1, R.I., 1)	152.6
Sage-Allen & Co. (13 Conn. stores)	58.1
Stamford	
Dress Barn (68 specialty stores)	33.5
(Saks Fifth Avenue, New York, branch opened March 1983 in Stamford Town Center Mall. Expected to reach a volume of $15 million by 3rd year)	
MAINE	
Brunswick	
W.F. Senter Co. (1 store)	2.8
Damariscotta	
R.H. Reny Inc. (12 stores)	7.0
Freeport	
L. L. Bean (Mail order business, plus one store with estimated sales of over $20 million)	125.0+
Portland	
Porteous Mitchell & Braun (4 stores plus Downeast Shops specialty store division)	27.0
Waterville	
Butler's Department Store (1 store)	2.5
MASSACHUSETTS	
Boston Area	
Filene's (Federated Department Stores, Cincinnati, Ohio) (14 Department stores: Me. 1, Mass. 10, N.H. 2, R.I. 1, 8 basement stores: Mass. 4, N.H. 1, N.Y. 3)	372.8
Boston area (14 stores)	250.0
(Flushing, N.Y. store opened May 1983; expected 1st year volume: $8-$10 million. 2 basement stores in Boston and department stores in Portsmouth, N.H. and Portland, Me. opened in 1983. Units in Waterford, Conn. and Albany, N.Y. to open in 1984.)	

(Boston Area continued)

* A limited number of apparel specialty stores for which sales figures are available are included in this report. Reported sales are for the year 1982, or closest fiscal period, reflecting published figures or best available trade estimates.

DEPARTMENT STORE SALES

NORTHEAST

	Approx. Sales (Millions of $)
MASSACHUSETTS	
Boston Area (continued)	
Harvard Coop., Cambridge (6 stores, including 5 on major campuses in Boston and Cambridge, 1 in downtown Boston)	$ 45.0+
Jordon Marsh (Allied Stores, New York, N.Y.) (14 stores: Mass. 11, Me. 1, N.H. 1, R.I. 1) (Hanover, Mass. store opened Sept. 1983; Crystal Mall, Waterford Conn. store to open July 1984)	410.0
Kennedy's (Phillips-Van Heusen Corp., New York, N.Y.) (8 stores in Mass. and R.I.)	41.7
Lechmere, Cambridge (Dayton-Hudson, Minneapolis, Minn.) (16 specialty stores)	188.0
The Talbot's, Hingham, Mass. (Catalog headquarters. Also operates 16 specialty stores)	80.0+
Pittsfield	
England Brothers Inc. (3 Mass. stores)	9.5
Springfield	
Albert Steiger Inc. (9 Mass. department stores)	50.0
Waltham	
Grover Cronin Inc. (1 store)	12.0
NEW JERSEY	
Bridgeton	
Rovner's Department Store (3 stores: N.J. 2, Del. 1)	5.2
Burlington	
Burlington Coat Factory (Burlington Coat Factory, New York, N.Y.) (31 stores) (5 units opened Sept. 1983; Ohio and Tex. stores in Oct. 1983)	130.5
Caldwell	
J. M. Towne & Co. (2 N.J. stores)	2.5
Lakewood	
Reynolds Bros. (4 N.J. stores)	6.0
Newark	
Bamberger's (R.H. Macy & Co., New York, N.Y.) 23 stores: N.J. 14, Pa. 5, N.Y. 1, Del. 1, Md. 2; also 3 Furniture Clearance Centers, 7 Auto Centers) (Paramus store was enlarged)	975.0
Hahne & Co. (Associated Dry Goods, New York, N.Y.) (8 N.J. stores)	105.0
Ocean City	
Stainton's Department Store	7.0

DEPARTMENT STORE SALES

NORTHEAST	Approx. Sales (Millions of $)
NEW JERSEY	
Paramus	
Stern's/Gertz (Allied Stores, New York, N.Y.) (16 stores in a consolidated operation as of August 1982)	$ 310.0
Paterson	
Meyer Brothers (2 N.J. stores)	4.0
Trenton	
United Department Stores (owns and buys for 5 Denby Stores, 5 S.P. Dunham, 5 Outlet Department Stores; 1 Sattlers, which was closed Jan. 1983)	50.0+
NEW YORK	
Binghamton	
Fowler's (S. Grumbacher & Sons, York, Pa.) (1 store, Johnson City, N.Y.)	3.0
Buffalo	
Adam, Meldrum & Anderson (10 N.Y. stores)	97.0
The Sample Inc. (12 N.Y. stores)	21.0
Cohoes	
Cohoes Specialty Stores (E.A. Sanford Co.) (2 stores: N.Y. 1, Conn. 1; 3rd to open in Fall 1983)	36.0
Elmira	
S.F. Iszard & Co. (2 N.Y. stores)	8.0
Rosenbaum's of Elmira, Inc. (3 N.Y. stores)	3.0
Glens Falls	
Economy Dry Goods, South Glens Falls, N.Y. (2 N.Y. stores: Joy Dept. Stores, Glens Falls and Rensselaer, N.Y.)	20.0
Pearl's Dept. Stores Inc. (20 specialty stores in N.Y.)	3.0+
Jamestown	
Jamestown-Bigelow Co. (1 department store) (Also operates 1 specialty store)	3.5
Kingston	
Britts Dept. Store Corp. (1 department store)	6.0
Liberty	
Sullivan's (2 specialty stores in N.Y.)	16.0+
New York City Area (Also see NEW JERSEY listings)	
Abraham & Straus, Brooklyn, N.Y. (Federated Dept. Stores, Cincinnati, Ohio) (14 stores: N.Y. 9, N.J. 4, Pa. 2)	650.5
Short Hills, N.J.	30.0
Monmouth, N.J.	30.0
White Plains, N.Y.	39.0

(New York City Area continued)

DEPARTMENT STORE SALES

NORTHEAST	Approx. Sales (Millions of $)
NEW YORK	
New York City Area (continued)	
Alexander's (Alexander's Dept. Stores Inc., New York, N.Y.) (16 stores: Conn. 1, N.J. 3, N.Y. 12) Fiscal year ending July 30:	$ 511.4
B. Altman & Co. (The Altman Foundation, New York, N.Y.) (7 stores: N.Y. 3, N.J. 2, Pa. 2)	329.0
Fifth Avenue	157.0
White Plains	40.0
Paramus, N.J.	38.0
Manhasset, N.Y.	34.0
Willow Grove, Pa. (opened August 1982. Annual volume at the rate of $16 million as of Oct. 1983)	6.0
Short Hills, N.J.	29.0
Bergdorf Goodman (Carter Hawley Hale, Los Angeles, Calif.) (1 specialty store) (Undergoing extensive renovation)	75.0
Bloomingdale's (Federated Dept. Stores, Cincinnati, Ohio) (12 full-line department stores: N.Y. 4, N.J. 2, Va. 1, Md. 1, Pa. 2, Conn. 1, Mass. 1)	680.5
59th Street	490.0
(A store in Valley View Center, Dallas, was opened in October 1983. Expected 1st year volume: $57 million)	
Bonwit Teller (Allied Stores, New York, N.Y.) (13 stores: Mass. 1, N.Y. 3, N.J. 1, Pa. 2, Ill. 2, Mich. 1, Fla. 2, Calif. 1)	110.0
Fifth Avenue, New York	21.0
Chicago, Ill. (2 stores)	21.0+
(A Palm Desert, Palm Springs, Calif., store was opened in Oct. 1983 which is expected to reach a volume of $10-$15 million in its first year)	
Brooks Bros. (Allied Stores, New York, N.Y.) (34 stores, incl. 5 in Japan)	180.0
Gimbels East (Batus Inc., New York, N.Y.) (Gimbels-New York and Gimbels-Philadelphia operations were combined in April 1, 1983, with a total of 20 units)	417.0
New York area: N.Y. 7, Conn. 1, N.J. 1)	277.0
Loehmann's Inc. (Acquired by Associated Dry Goods Corp. in 1983) (61 specialty stores in 25 states)	260.0
Lord & Taylor (Associated Dry Goods, New York, N.Y.) (38 stores: N.Y. 4, Conn. 2, Mass. 4, Md. 1, N.J. 2, Pa. 2, Va. 2, D.C. 1, Fla. 2, Ga. 1, Ill. 7, Mich. 3, Tex. 7. Also Clearance Center, Huntington, N.Y.)	558.0+
New York Area (9 stores)	190.0
Fifth Avenue	81.0
Available sales estimates for branch stores in other areas:	
North Central:	
Chicago area (7 stores)	103.0
Detroit area (4 stores)	39.0
South:	
Houston, Tex. area (3 stores)	39.0

(New York City Area continued)

DEPARTMENT STORE SALES

NORTHEAST

NEW YORK

New York City Area (continued)

	Approx. Sales (Millions of $)
Lord & Taylor (continued)	
(a 4th Houston store, at West Oaks, is to be opened Feb. 1984. Expected volume the 1st year: $10 million)	
Dallas, Tex. area (3 stores)	$ 31.7
Atlanta, Ga. (completely renovated in 1983)	12.5
Cutler Ridge, Miami, Fla.	10.0
(An Aventura Mall, Miami, store was opened in Jan. 1983. Expected 1st year volume: $10 million. A 4th Fla. store, at Fort Lauderdale Mall, was opened in Oct. 1983. Expected volume 1st year: $17 million. A store is also operated at Palm Beach Mall)	
Macy's New York (R.H. Macy, New York, N.Y.) (16 stores: N.Y. 14, Conn. 2, plus 4 Furniture Clearance Centers and 8 Auto Centers)	
Fiscal year ending July 1983:	1,043.0
Herald Square, New York	325.0
(An Aventura Mall, Miami, Fla. store was opened in Oct. 1983, which is expected to have a volume of over $50 million in its first full year. 2 Houston, Tex. stores are to be opened in 1984; 3 more in Texas in 1985)	
Mays (J.W. Mays Inc., Brooklyn, N.Y.) (4 New York stores, including leased departments)	98.0
Ohrbach's (AMCENA Corp., New York, N.Y.) (12 stores: N.Y. 3, N.J. 3, Calif. 6)	175 to 180
Plymouth Shops (Allied Stores, New York, N.Y.) (45 stores)	49.0
Saks Fifth Avenue (Batus Inc., New York, N.Y.) (34 stores: N.Y. 4, plus a small Southampton unit; N.J. 2, Pa. 2, Md. 1, N.H. 1, Mass. 1, Mich. 2, Ohio 1, Ill. 3, Ga. 1, Fla. 3, Tex. 1, Ariz. 1, Southern Calif. 5, Northern Calif. 3, Mo. 1, Nev. 1)	740.0
Fifth Avenue (4-year renovation program completed in 1982)	180.0+
(Stamford Town Center Mall, Conn., branch was opened March 1983. Expected to reach a volume of $15 million by its 3rd yr.)	
Available sales estimates for branch stores in other areas:	
North Central:	
Detroit area (3 stores)	39.0
Chicago area (3 stores)	65.0
(A store in Country Club Plaza, Kansas City, was opened in August 1982. Expected 1st year volume: $13 million)	
South:	
Dallas Galleria opened in Oct. 1982. Expected volume 1st year: $20.0 million	
Houston (1 store)	30.0+
(A 2nd Houston store--West Oaks Mall--was opened Aug. 1983. Expected 1st year volume: $12-$13 million)	
(A New Orleans store was opened in Oct. 1983; volume of $15 million expected within 3 years)	

(New York City Area continued)

DEPARTMENT STORE SALES

NORTHEAST	Approx. Sales (Millions of $)
NEW YORK	
New York City Area (continued)	
Saks Fifth Avenue (continued)	
West:	$ 71.0
Southern California (5 stores)	
(A 2nd San Diego branch--Saks' 9th Calif. store--was opened in Sept. 1983. Expected to reach an annual rate of $12 million in 3 years)	
San Francisco area (3 stores)	40.0+
Union Square	30.0
(A branch store is to be opened in Cincinnati, Ohio, in March 1984)	
Syms (11 specialty stores)	152.0
John Wanamaker, Liberty Street (1 store)	6.0
Oneonta	
Bresee's Oneonta Department Store (1 store)	5.0
Patchogue	
Swezey & Newins (3 N.Y. stores)	20.0
Rochester	
B. Forman & Co. (7 N.Y. stores)	20.0+
McCurdy & Co. (7 N.Y. stores)	20.0+
Sibley's (Associated Dry Goods, New York, N.Y.) (15 N.Y. stores)	160.0
Rome	
Alfred's Department Store (2 stores)	2.7
Schenectady	
The Carl Co. (6 N.Y. stores)	10.0
Seaford	
Mid-Island Department Stores (6 L.I., New York, stores)	24.0
Syracuse	
The Addis Co. (4 N.Y. Stores)	10.0
Chappell's Department Store, Northern Light Shopping Center (6 N.Y. stores)	25.0
Dey's (Allied Stores, New York, N.Y.) (4 stores)	40.0
Troy	
Stanley's (1 store)	2.0
White Plains	
Howland Steinbach (Supermarkets General, Woodbridge, N.J.) (28 stores: Conn. 6, N.H. 1, N.Y. 11, Mass. 4, N.J. 6)	110.0
PENNSYLVANIA	
Allentown	
Hess's (Crown American Corp., Johnstown, Pa.)(29 stores: Pa. 25, Md. 1, N.Y. 3) (Hess's acquired Penn Traffic Co.'s 6 department stores and 2 specialty stores, Western Pa., in Feb. 1982, adding $30 million in company sales volume. Plans to build 3 new stores a year for next 5 years.)	239.6

(Allentown continued)

DEPARTMENT STORE SALES

NORTHEAST	Approx. Sales (Millions of $)
PENNSYLVANIA	
Allentown (continued)	
H. Leh & Co. (3 stores)	$ 15.0
Aston	
The Dry Goods (SCOA Industries, Columbus, Ohio) (5 stores: Del. 3, N.Y. 1, Pa. 1)	80.0
Clearfield	
Leitzinger Bros. (1 store)	2.0
Easton	
Orr's Department Store (4 stores: Pa. 3, N.J. 1)	5.0+
Harrisburg	
Pomeroy's Inc. (Allied Stores, New York, N.Y.) (6 Pa. stores, not including stores operated out of Levittown Pa. headquarters)	55.0+
Hazelton	
P. Deisroth's Son's (2 Pa. stores)	5.0
Honesdale	
Katz Bros. (1 store)	2.0
Johnstown	
Glosser Bros. (1 store) (Also operates Gee Bee Discount Stores)	130.0
Lancaster	
Watt & Shand (2 Pa. stores)	25.0
Lehighton	
Bright Stores Inc. (1 store)	4.5
Levittown	
Pomeroy's Inc. (Allied Stores, New York, N.Y.) (8 stores: Pa. 6, N.J. 1, Del. 1)	70.0
Lewistown	
Danks & Co. (4 Pa. stores)	5.7
Philadelphia Area	
Gimbels-East (Batus, Inc., New York, N.Y.) (combined with Gimbels New York Apr. 1983 for a 20-store total)	417.0
10-stores: Pa. 8, N.J. 2	140.0
Strawbridge & Clothier (12 department stores plus 17 Clover Stores)	472.3
Department stores (12 stores: Pa. 7, N.J. 3, Del. 2)	290.0+

(Philadelphia Area continued)

DEPARTMENT STORE SALES

	Approx. Sales (Millions of $)
NORTHEAST	
PENNSYLVANIA	
Philadelphia Area (continued)	
John Wanamaker (Carter Hawley Hale, Los Angeles, Calif.) (16 stores: Pa. 11, N.J. 2, N.Y. 2, Del. 1)	$ 350.0
(Bloomingdale's, New York, N.Y. opened a store at Willow Grove, Pa. in August 1982. Volume is expected to reach $20 million in 1983. Also operates a unit in King of Prussia which has a volume of $20.0+ million).	
(A&S, New York, operates a store at Willow Grove which was opened in Oct. 1982 and at King of Prussia, which are expected to have combined sales of about $35 million in 1983)	
Pittsburgh	
Gimbels-Pittsburgh (Batus Inc., New York, N.Y.) (7 Pa. stores)	148.0
Joseph Horne Co. (Associated Dry Goods, New York, N.Y.) (13 stores: Pa. 11, Ohio 2--plus 2 Boston stores in Pa.)	165.0
Kaufmann's Department Stores (May Department Store Co., St. Louis, Mo.) (10 stores: Pa. 7, Ohio 2, Ill. 1)	268.6
(A Charleston, W.Va., store was opened in 1983)	
Reading	
Boscov's Dept. Stores (9 stores: Pa. 8, Del. 1)	165.0
Scranton	
Cleland-Simpson Co. (John Wanamaker, Philadelphia, Pa.) (1 store)	20.0
Uniontown	
Metzler's Dept. Store (2 Pa. stores)	4.0
York	
S. Grumbacher & Sons (14 stores under various names)	50.0+
NORTH CENTRAL	
ILLINOIS	
Bloomington	
Rolands of Bloomington Inc. (2 Ill. stores)	5.0
Champaign	
Robeson's Inc. (1 store)	7.0
Chicago Area	
Baskin Clothing Co. (Hart Schaffner & Marx, Chicago, Ill.) (22 stores)	40.0
Bonwit Teller (Bonwit Teller, New York, N.Y.) (2 stores)	21.0+
Michigan Avenue	14.0
Oakbrook	7.0+

(Chicago Area continued)

DEPARTMENT STORE SALES

NORTH CENTRAL

ILLINOIS

Chicago Area (continued)

	Approx. Sales (Millions of $)
Carson Pirie Scott & Co. (24 stores in Department Store Div.)	$ 323.4
Chicago area (16 department stores, 2 specialty stores)	260.0
State Street	75.0
Edens Plaza	23.0
Evergreen Plaza	26.0
Gateway	6.0
Lakehurst	8.0
Lincoln Mall (Matteson)	13.5
North Riverside	16.0
Orland Sq.	13.5
Randhurst	21.0
South Lakes	11.5
Woodmar (Hammond, Ind.)	10.5
Yorktown	29.0
Crawford Department Stores (3 Ill. stores)	12.5
Evans Inc. (8 stores, excl. fur departments)	23.0
K mart (K mart, Troy, Mich.) (64 Chicago area stores)	385.0
Lord & Taylor (Lord & Taylor, New York, N.Y.) (7 Chicago stores)	103.0
Water Tower Place	29.0+
Northbrook Court	17.0
Lytton's (Henry C. Lytton & Co., Chicago, Ill.) (13 stores)	40.0+
Madigan Bros., River Forest (5 specialty stores)	30.0
I. Magnin (I. Magnin, San Francisco, Calif. (3 stores)	48.2
Northbrook Court	12.9
Michigan Avenue	26.7
Oakbrook Center	8.6
Marshall Field (Batus Inc., New York, N.Y.) (20 stores: Ill. 17, Wis. 1, Tex. 2)	605.0
Chicago Division (18 stores)	570.0
State Street	153.0
Oakbrook	58.0
Old Orchard	73.0
River Oaks	33.0
Water Tower Place	50.0
Woodfield	42.0
Southern Division	
Galleria, Houston	24.0
Galleria, Dallas (opened Oct. 1982; expected 1st year volume: $25 million)	
Montgomery Ward (16 Chicago area stores)	264.0
Neiman Marcus (Neiman Marcus, Dallas, Tex.) (2 stores)	40.1
Northbrook	27.1
Oakbrook	13.0
(A Michigan Ave. store was opened in Nov. 1982; expected 1st year volume: $40 million)	

(Chicago Area continued)

DEPARTMENT STORE SALES

NORTH CENTRAL

ILLINOIS

Store	Approx. Sales (Millions of $)
Chicago Area (continued)	
J.C. Penney (J.C. Penney, New York, N.Y.) (26 stores)	$ 400.0
Brickyard	26.0
Woodfield	50.0
Ford City	42.0
North Riverside Park	30.0
Joliet Mall	14.0
Saks Fifth Avenue (Saks Fifth Avenue, New York, N.Y.) (3 Chicago area stores)	65.0
Michigan Avenue	32.0
Sears, Roebuck (Chicago area: 22 department stores, 7 surplus stores)	775.0+
State Street	25.0
Hawthorn	25.0
Northbrook Court	20.0
Oakbrook	35.0
River Oaks	35.0
Woodfield	35.0
Stanley Korshak (RV Ltd., Chicago, Ill.) (Michigan Ave. store opened in Aug. 1983. Expected 1st year volume: about $20.0 million)	30.0+
Spurgeon Mercantile Corp. (90 stores in Ill., Ind., Ia., Mich., Minn., Wis.)	57.0
Wieboldt Stores Inc. (Schottenstein Stores Corp., Columbus, Ohio) (14 Chicago area stores)	179.1
State Street	33.1
Ford City	22.5
Columbia	
Weilbacher's (1 store)	3.8
De Kalb	
M.F. Malone (1 store)	3.0
Elgin	
Ackemann Bros. (2 Ill. stores)	5.0
Joseph C. Spiess Co. (3 Ill. stores)	6.0
Granite City	
The Glik Co. (12 Ill. stores)	6.0
Peoria	
P.A. Bergner & Co. (25 stores: Ill. 22, Wis. 3) (Also operates Myers Bros., Springfield, Ill.) (The 16-store Bergner Division was merged with Bergner-Weise Co., Rockford, Ill. in Feb. 1982)	186.0
Szold's Inc. (3 stores, including Walton's Fairbury, Ill.)	13.0

DEPARTMENT STORE SALES

NORTH CENTRAL	Approx. Sales (Millions of $)
ILLINOIS	
Rock Island	
McCabe's (1 store)	$ 5.0
St. Charles	
Colson's Department Store (2 Ill. stores)	3.0
Tinley Park	
The People's Store of Roseland (1 store)	10.0
INDIANA	
Elkhart	
Ziesel Dept. Stores (2 Ind. stores)	4.8
Hammond	
Edward C. Minas Co. (2 Ind. stores)	6.0
Indianapolis	
L. S. Ayres & Co. (Associated Dry Goods Corp., New York, N.Y.) (13 stores in Ind.) (To be merged with H. & S. Pogue, Cinn.)	200.0
William H. Block Co. (Allied Stores, N.Y.) (9 Ind. stores)	80.0+
Knox	
Weinberg Stores (2 Ind. stores)	2.5
La Porte	
Levine's Boston Stores Inc. (2 Ind. stores)	3.0
Muncie	
Ball Stores (3 stores in Ind. Also operates Ball Stores Collegienne Shops)	12.0
New Albany	
The Fair Store (1 store)	2.3
Richmond	
The George H. Knollenberg Co.	3.0
Terre Haute	
Root Dry Goods (Mercantile Stores, New York, N.Y.) (3 stores: Ind. 2, Ill. 1)	6.0
Schultz & Co. (1 store)	4.0
Valparaiso	
J. Lowenstine & Sons (1 store)	3.3

DEPARTMENT STORE SALES

NORTH CENTRAL	Approx. Sales (Millions of $)
IOWA	
Cedar Rapids	
Armstrong Inc. (1 store)	$ 25.0
Davenport	
Petersen-Harned-Von Maur Inc. (10 stores: Ia 9, Ill. 1)	25.0+
Des Moines	
Younker's Dept. Store (Equitable of Iowa Companies, Des Moines, Ia.) (26 stores: Ia. 21, Ill. 1, Minn. 1, Neb. 2, S.C. 1, plus 3 home furnishings stores)	166.6
Dubuque	
Rosheks (Div. of Gamble Dept. Stores, Chicago, Ill.) (1 store)	10.0
MICHIGAN	
Ann Arbor	
Goodyear's (1 store)	2.0
Bay City	
W.R. Knepp Co. (3 Mich. stores)	10.0
Detroit Area	
Crowley's (10 Mich. stores)	76.4
Hudson's (Dayton Hudson Corp., Minneapolis, Minn.) (20 stores: Mich. 17, Ohio 1, Ind. 2)	683.8
Detroit area (8 stores)	475.0
Downtown Detroit store (closed Jan. 1983)	40.0-
(Opened stores in Lansing, Mich. in 1982 and Battle Creek, Mich. in 1983)	
Saks Fifth Avenue (Saks Fifth Avenue, New York, N.Y.) (2 stores)	39.0
Fairlane Town Center Mall	15.0
Somerset Mall	24.0
Sears Roebuck (10 Detroit area stores)(Southfield closed Apr. 1983)	400.0
Lord & Taylor (Lord & Taylor, New York, N.Y.)(4 stores)	37.0
Winkelman Stores Inc. (88 stores: Mich. 58, Ohio 20, Ill. 10)	99.2
Detroit area (39 stores)	54.0
Escanaba	
The Fair Store (8 Mich. stores under various names)	4.0
Grand Rapids	
Gantos Inc. (39-unit women's spec. chain, Mich., Ill., Ind.)	47.0
Herp's Co. (Allied Stores, New York, N.Y.) (6 Mich. stores)	
Grand Rapids Store	20.0
Paul Steketee & Sons Co. (6 Mich. stores)	27.0

DEPARTMENT STORE SALES

NORTH CENTRAL

	Approx. Sales (Millions of $)
MICHIGAN	
Jackson	
L.H. Field (Allied Stores, New York, N.Y.) (1 store)	$ 5.0
Jacobson Stores (17 department stores: Fla. 6, Mich. 10, Ohio, 1. Also 7 home furnishings stores and 1 children's wear store)	181.3
Kalamazoo	
Gilmore Bros. (3 Mich. stores)	12.0
Saginaw	
W.C. Wiechmann Co. (3 Mich. stores)	8.5
Sandusky	
Polewack Stores (6 Mich. stores)	3.0
Traverse City	
J.W. Milliken (3 Mich. stores)	5.0+
Trenton	
Mulias & Ellias Dept. Store (1 store)	2.0
MINNESOTA	
Cloquet	
The Johnson Co. (1 store)	2.6
Detroit Lakes	
L. & J. Norby Co. (1 department store, 3 specialty stores in Minn.)	3.6
Duluth	
Duluth Glass Block Stores (Mercantile Stores, New York, N.Y.) (1 store plus O.J. DeLendrecie Co., Fargo, N.D. store)	23.0+
Wahl's Dept. Store (1 store plus Griffiths, Grand Forks, N.D.)	5.0
Mankato	
Bretts Dept. Stores (6 Minn. stores) (Hutchinson Mall store opened Aug. 1982)	15.0
Minneapolis	
Dayton's (Dayton Hudson, Minneapolis, Minn.) (13 stores: Minn. 9, N.D. 2, S.D. 1, Wis. 1, plus 3 homefurnishings stores)	437.3
Donaldson's (Allied Stores, New York, N.Y.) (9 stores: Ia. 2, Minn. 7)	100.0+
Powers Dry Goods (Associated Dry Goods, New York, N.Y.) (7 Minn. stores)	45.0
Salkin & Linoff (100+ specialty stores under various names)	85.0
New London	
The Big Store Inc. (1 store)	2.1

DEPARTMENT STORES SALES

NORTH CENTRAL	Approx. Sales (Millions of $)
MINNESOTA	
Redwood Falls	
Ehlers Dept. Stores (6 stores: Minn. 5, Ia. 1)	$ 6.0
Rochester	
Massey's (1 store)	3.0
St. Cloud	
Fandel (2 department stores, 2 Intrigue Spec. Stores in Minn.)	6.0+
G.R. Herberger's Inc. (24 stores: Minn. 9, Mont. 3, N.D. 3, S.D. 2, Neb. 3, Wis. 3, Wyo. 1)	50.0-
Joplin	
Newman's (5 stores: Mo. 2, Okla. 2, Kans. 1)	21.0
Kansas City	
Halls Dept. Store (Hallmark Cards, Kansas City, Mo.) (3 Mo. stores)	35.0
Harzfeld's (Allied Stores, New York, N.Y.) (8 specialty stores: Kans. 2, Mo. 4, Okla. 2)	30.0
The Jones Co. (Mercantile Stores, New York, N.Y.) (7 Mo. stores)	150.0
Macy's Midwest (R.H. Macy, New York, N.Y.) (19 stores: Kans. 5, Mo. 8, Ohio 6) (Red Bridge Shopping Center Store in K.C. was closed)	200.0
Swanson's (Hallmark Cards, Kansas City, Mo.) (1 specialty store)	9.5
Woolf Bros. (9 stores: Mo. 5, Kans. 1, Tex. 1, Tenn. 1, Okla. 1)	35.0
(Saks Fifth Avenue, New York, opened a store Aug. 1982 in Country Club Plaza. Expected 1st year volume: $13 million)	
St. Joseph	
Hirsch's (The Dunlap Co., Fort Worth, Tex.) (1 store)	2.3
Townsend & Wall Co. (1 specialty store)	2.5
St. Louis	
Boyd's (Cluett, Peabody & Co., New York, N.Y.) 8 specialty stores (To be sold)	30.0
Famous Barr (May Department Stores, St. Louis, Mo.) (15 stores: Mo. 12, Ill. 3) (Opened a store in Chesterfield, Mo. in 1983)	363.5
Stix, Baer & Fuller (Associated Dry Goods, New York, N.Y.) (12 stores: Ill. 1, Kans. 1, Mo. 10) (To be acquired by Dillard's in 1984)	139.4
Sedalia	
C.W. Flower D. G. Co. (2 specialty stores)	2.0
Springfield	
Heer's Inc. (Allied Stores, New York, N.Y.) (2 stores)	20.0+

DEPARTMENT STORE SALES

NORTH CENTRAL	Approx. Sales (Millions of $)
NEBRASKA	
Chadron	
Anderson's Inc. (3 stores)	$ 2.5
Fremont	
George Schwester's & Sons (9 stores in Neb.)	7.5
Lincoln	
Miller & Paine Inc. (3 Neb. stores)	10.0
Omaha	
J.L. Brandeis & Sons (10 stores: Ia. 3, Neb. 7)	95.0
Philips Stores (7 stores: Ia. 2, Neb. 5)	11.0
NORTH DAKOTA	
Fargo	
O.J. de Lendrecie Co. (Duluth Glass Block Stores, Duluth, Minn.) (1 store)	4.0
Larimore	
Johnson Stores Co. (16 N.D. specialty stores)	5.0
OHIO	
Akron	
The M. O'Neil Co. (May Department Stores, St. Louis, Mo.) (10 Ohio stores)	140.1
Ashtabula	
Carlisle's (9 stores: Ohio 5, Pa. 4)	45.0+
Bowling Green	
Fred W. Uhlman & Co. (13 Ohio department stores plus specialty stores in Ohio, Ind., Mich.)	19.0
Cincinnati	
Ben's Department Store (2 Ohio stores)	2.5
McAlpin Co. (Mercantile Stores, New York, N.Y.) (9 stores: Ohio 6, Ky. 3)	240.0
H. & S. Pogue Co. (Associated Dry Goods, New York, N.Y.) (5 stores: Ohio 5, Ky. 1) (To be merged with L.L. Ayres, Indianapolis)	72.0
Shillito Rikes (Federated Department Stores, Cincinnati, Ohio) 14 stores: Ohio 10, Ky. 4, resulting from the merger in April 1982 of Shillito with Rikes, Dayton, Ohio)	342.9
(Saks Fifth Avenue will open a store in March 1984.)	
Cleveland	
Higbee Co. (11 stores in Ohio) (The downtown Youngstown store closed; took over former Halle's unit, Summit Mall, Akron)	215.2
The May Co. (May Dept. Stores, St. Louis, Mo.) (10 stores in Ohio)	189.0

DEPARTMENT STORE SALES

NORTH CENTRAL	Approx. Sales (Millions of $)
OHIO	
Columbus	
F. & R. Lazarus (Federated Department Stores, Cincinnati, Ohio) (17 stores: Ohio 11, Ind. 5, W.Va. 1)	$ 389.3
(2 former Halle units were re-opened by new owners as the Union Stores in Sept. 1982)	
Dayton	
Elder-Beerman Department Store Div. (Elder-Beerman Stores Corp., Dayton) (21 department stores)	200.0
East Liverpool	
D. M. Ogilvie & Co. (1 store)	2.5
Jackson	
Stiffler Stores Inc. (10 stores)	4.0
Lancaster	
Hickle's (1 store)	2.0
Lima	
Gregg's Inc. (1 store)	3.0
Portsmouth	
Marting Bros. (2 Ohio stores)	7.0
Springfield	
Edward Wren Store (Allied Store Corp., New York, N.Y.) (2 stores)	9.0
Toledo	
The Lion Dry Goods Co. (Mercantile Stores Co., New York, N.Y.) (3 department stores, 2 specialty stores in Ohio)	80.0
Wooster	
Wm. Annat Co. (1 store)	2.0
H. Friedlander Co. (1 store)	5.0
Youngstown	
Strouss (May Department Stores, St. Louis, Mo.) (10 stores: Ohio 8, Pa. 2. Also operates Rivets Specialty Stores)	100.5
WISCONSIN	
Appleton	
Campbell Stores Co. (8 Wis. specialty stores)	3.0
Brookfield	
T.A. Chapman Co. (8 Wis. stores incl. 2 Manchester's Specialty Stores)	12.0
Kohl's Department Stores (Batus Inc., New York, N.Y.) (25 stores: Wis. 18, Ill. 1)	140.0

DEPARTMENT STORE SALES

	Approx. Sales (Millions of $)
NORTH CENTRAL	
WISCONSIN	
Madison	
Emporium of Madison (3 Wis. stores)	$ 3.0
Yost's Bros. Inc. (5 Wis. stores)	6.0
Marinette	
Lauerman Bros. Co. (5 stores: Wis. 4, Mich. 1)	5.3
Milwaukee (also see Brookfield)	
Boston Store (Federated Department Stores, Cincinnati, Ohio) (8 stores in Milwaukee area)	117.9
T.O. Chapman (6 department stores, 2 specialty stores)	15 to 20
Gimbels-Midwest (Batus Inc., New York, N.Y.) (11 Wis. stores)	171.0
8 Milwaukee stores	130.0+
A. Goldman & Sons (1 store)	4.0
Sheboygan	
H.C. Prange Co. (also Green Bay) (19 stores: Wis. 15, Ill. 2, Mich. 2)	107.0
Wisconsin Rapids	
Johnson Hills Department Stores (4 Wis. stores)	10.0
SOUTH	
ALABAMA	
Albertville	
Worth Ratliff (10 specialty stores)	2.5
Anniston	
Hudson Department Stores (Belk Stores Services, Charlotte, N.C.) (6 stores)	3.0
Birmingham	
Parisian Inc. (9 specialty stores in Ala.)	75.0+
Pizitz, Inc. (11 Ala. stores)	82.5
Huntsville	
Dunnavant's Inc. (1 store)	3.0
Mobile	
C. J. Gayfer Co. (Mercantile Stores, New York, N.Y.) (12 stores: Ala. 3, Fla. 6, Miss. 3)	250.0
Montgomery	
Gayfers (Mercantile Stores, New York, N.Y.) (6 stores)	115.0

DEPARTMENT STORE SALES

SOUTH	Approx. Sales (Millions of $)
ARKANSAS	
El Dorado	
The El Dorado House (2 stores)	$ 2.2
J.A. West Co. (11 stores in Ark., La., Mo., Okla., Tex. Also 4 Gibson's Department Stores)	24.0
Fayetteville	
Campbell-Bell Inc. (3 Ark. stores)	5.5
Fort Smith	
The Boston Store (The Boston Store Dry Goods Co., Fort Smith, owned by Wickes Companies, Inc., Santa Monica, Cal.) (Stores in Ark., Tex., and La.)	30.0
Arkansas (2 stores)	10.0
Hunt Dry Goods (8 stores: Ark. 6, Okla. 1, Tex. 1)	10.5
Little Rock	
M.M. Cohn (12 specialty stores: Ark. 4, Okla. 4, Tenn. 4)	50.0
Dillard Dept. Stores--Little Rock Div. (Dillard Dept. Stores Inc., Little Rock, Ark.) (18 stores: Ark. 6, La. 4, Tenn. 5, Tex. 3)	208.0
Magnolia	
Talbot's Department Store (1 store)	2.2
Newport	
Van Atkins Stores (7 stores: Ark. 6, Miss. 1)	4.0
DELAWARE	
Laurel	
R. E. Powell & Co. (3 stores)	2.3
Wilmington	
Kennard's Dept. Stores (4 Del. stores)	5.0
DISTRICT OF COLUMBIA	
Washington Area (Including nearby Virginia and Maryland stores. Also see Baltimore, Md. listings)	
Garfinckel's (Allied Stores, New York, N.Y.) (8 specialty stores plus two hotel shops)	90.0
Georgetown Park Mall	3.8
Hecht's (May Dept. Stores Co., St. Louis, Mo.) (24 stores: Md. 17, D.C. 1, Va. 6)	415.3
La Vogue (La Vogue, Richmond, Va.) (1 store)	2.1
Raleigh's Store (12 specialty stores)	60.0+
Woodward & Lothrop (16 stores: D.C. 2, Md. 10, Va. 4)	357.5
(Bradlees Dept. Stores, a discount chain, opened 10 stores in the D.C. area in 1983. Expected 1st year volume: $100 million)	

DEPARTMENT STORE SALES

SOUTH	Approx. Sales (Millions of $)
FLORIDA	
Bradenton	
Beall's Dept. Stores (26 apparel specialty stores in Florida)	$ 55.0
Jacksonville	
Furchgott's Inc. (6 Fla. stores)	20.0
May-Cohens (May Dept. Stores, St. Louis, Mo.) (6 Fla. stores)	57.9
Miami-Palm Beach Area	
Burdine's (Federated Dept. Stores, Cincinnati, Ohio) (23 Fla. stores) (Melbourne and Tampa stores were opened in 1983; 3 Fla. stores to be opened in 1984: Coconut Grove, Miami; Gainsville, Coral Springs)	582.8
J. Byron's (Jack Eckerd Corp., Clearwater, Fla.) (45 Fla. stores)	168.4
Jordan Marsh-Florida (Allied Stores, New York, N.Y.) (14 Fla. stores) (Miami International Mall store opened Aug. 1982; Melburne, Fla. store opened Feb. 1983)	240.0
Lord & Taylor (Lord & Taylor, New York)	
Cutler Ridge (Aventura Mall, Miami, opened Jan. 1983; expect $10 million the first year. Fort Lauderdale store opened Oct. 1983; expect $19 million the 1st year)	10.0
(Macy's, New York opened a store in Aventura Mall, Miami, Fla. in Oct. 1983 which is expected to reach a volume of over $50 million in its first year.)	
Tampa-St. Petersburg Area	
Maas Bros., Tampa (Allied Stores, New York, N.Y.) (20 Fla. stores)	270.0
Robinson's of Florida, St. Petersburg (Associated Dry Goods, New York, N.Y.) (7 stores in Fla.)	80.0
Winter Park	
Ivey's Florida (Batus Retail Div., New York, N.Y.) (10 Fla. stores)	85.0
GEORGIA	
Atlanta Area	
Davison's (R.H. Macy, New York, N.Y.) (13 stores: Ga. 12, S.C. 1) (Gwinnett Place, Atlanta, Ga., store to open in Spring 1984) (An eighth metropolitan Atlanta store was opened in the Perimeter Mall in Sept. 1982)	250.0
H. Kessler & Co. (6 Ga. stores plus wholesaling operation)	14.0
Muse's (George Muse Clothing Co.) (7 Atlanta area stores)	15.0
Rich's (Federated Dept. Stores, Cincinnati, Ohio) (16 stores: Ga. 12, Ala. 2, S.C. 2, plus Outlet Home Store) (Rich's also operated 21 Richway Discount stores with a volume of $321.6 million)	430.1
Sunshine Dept. Stores (6 stores)	6.0

DEPARTMENT STORE SALES

SOUTH	Approx. Sales (Millions of $)
GEORGIA	
Augusta	
J.B. White & Co. (Mercantile Stores, New York, N.Y.) (4 stores: Ga. 2, S.C. 2)	$ 100.0
Canton	
Jones Mercantile Co. (1 store)	2.5
Columbus	
J. A. Kirven (3 stores in Ga.)	8.0
Cordele	
B. C. Moore (B. C. Moore & Sons, Wadesboro, N.C.) (Buying office for 28 stores in Ala. and Ga.)	20.0
Marietta	
Saul's Dept. Stores (7 Ga. stores)	4.0
Savannah	
Allied Outlet Stores (67 stores in Ga. and S.C.)	35.0
Levy's of Savannah Inc. (Allied Stores, New York, N.Y.) (2 stores)	6.5
KENTUCKY	
Danville	
Hub Frankel Co. (1 store)	5.5
Franklin	
Young's (4 stores)	3.0
Louisville	
J. Bacon & Co. (Mercantile Stores, New York, N.Y.) (6 stores: Ky. 5, Ind. 1)	95.0
Ben Snyder Inc. (8 stores: Ind. 1, Ky. 7)	25.0
Shapira Corp. (18 Ky. stores)	15.0
Stewart Dry Goods (Associated Dry Goods, New York, N.Y.) (7 stores: Ky. 6, Ind. 1)	66.0
Owensboro	
S.W. Anderson Co. (2 stores)	7.0
Vicco	
Martin's Department Stores (5 Ky. stores)	3.0
LOUISIANA	
Alexandria	
Wellan's (3 La. stores)	10.0

DEPARTMENT STORE SALES

SOUTH	Approx. Sales (Millions of $)
LOUISIANA	
Baton Rouge	
Bart-Well Inc. (operates Weill's Dept. Stores) (13 La. stores)	$ 6.0
Goudchaux's Inc. (6 La. stores, including 3 suburban Maison Blanche stores purchased in 1982 which had a combined sales volume of about $50 million)	155.8
DeRidder	
West Bros. Inc. (24 general merchandise stores in La. and Miss.)	59.0
Lake Charles	
Muller Co. Ltd. (Allied Stores, New York, N.Y.) (1 store)	10.0
Many	
Nichols Dry Goods Co. (16 stores: La. 15, Tex. 1)	9.8
New Orleans	
Leon Godchaux Clothing Co. (7 stores: La. 6, Miss. 1)	30.0
D.H. Holmes (15 stores: La. 13, Miss. 1, Ala. 1; plus car care centers and shoe stores)	240.7
Krauss Co., Ltd. (1 store)	22.0
(Saks Fifth Avenue store opened Oct. 1983. Expect to reach an annual rate of $15 million in 2 years)	
Ruston	
Lewis & Co. (1 store. Also operates Fever Tree and Stagg Shop)	4.0
Shreveport	
Rubenstein's Inc. (4 La. stores)	12.0
MARYLAND	
Baltimore (Also see DISTRICT OF COLUMBIA listings)	
Brager-Gutman (HRT Ltd., Los Angeles, Calif.) (2 gen. mdse. stores in Md.)	13.0
L. Epstein (7 Baltimore stores) (Also operates a wholesaling business)	25.0
Hochschild, Kohn Inc. (Supermarkets General, Woodbridge, N.J.) (10 Md. stores)	75.9
Hutzler's (8 Md. stores. A replacement store for the downtown unit will open in the Fall, 1984 in the Atrium)	75.0
Stewart's (Caldor Div., Associated Dry Goods, New York, N.Y.) (5 stores)	60.0
MISSISSIPPI	
Columbus	
Egger's Dept. Stores (2 Miss. stores)	4.0

DEPARTMENT STORE SALES

SOUTH	Approx. Sales (Millions of $)
MISSISSIPPI	
Jackson	
McRae's Inc. (12 Miss. stores; also a shoe store)	$ 124.4
Magee	
McAlpin's Dept. Store (1 store)	2.5
Meridian	
Marks Rothenberg Co. (3 stores)	5.0
Oxford	
The J.E. Neilsen Co. (1 store)	2.4
Tupelo	
R. W. Reid Co. (2 stores)	3.0
NORTH CAROLINA	
Burlington	
Belk-Beck Co. of Burlington (Belk Stores Services, Charlotte, N.C.) (4 stores)	15.0
Charlotte	
Ivey's Carolinas (Batus Retail Div., New York, N.Y.) (14 stores: N.C. 13, S.C. 1)	105.0
Elkin	
Spainhour's Store (7 N.C. stores)	6.0
Fayetteville	
Capitol of Fayetteville (3 N.C. stores)	5.0
Franklin	
People's Dept. Store (4 stores: N.C. 3, Ga. 1)	2.4
Raleigh	
Boylan-Pearce Inc. (1 store)	6.0
Shelby	
A.V. Wray & Six Sons (4 N.C. stores)	3.5
Whiteville	
Leder Bros. (10 stores: N.C. 7, S.C. 3)	6.0
Winston-Salem	
Davis Inc. (3 stores)	6.5

DEPARTMENT STORE SALES

SOUTH	Approx. Sales (Millions of $)
OKLAHOMA	
Checotah	
Sharpe Dept. Store (19 Okla. stores)	$ 9.0+
Chickasha	
Hicks Dept. Stores (5 stores)	2.0
Dewey	
Peter's Inc. (6 stores)	2.5
Oklahoma City	
John A. Brown Co. (Dayton Hudson, Minneapolis, Minn.) (6 deptartment stores in Okla.)	86.1
Langston Co. (3 Okla. City stores)	10.0
Shawnee	
Newton Wall Co. (15 stores: Okla. 10, Ark. 2, Miss. 3)	8.0
Tulsa	
Froug's Inc. (10 Okla. stores)	20.0+
The Vandever Co. (Dunlap Co., Fort Worth, Tex.) (2 Okla. stores)	10.0
(Sanger Harris, Dallas, Tex., opened a store in Tulsa in Aug. 1982)	
SOUTH CAROLINA	
Anderson	
Gallant-Belk (Belk Store Services Inc., Charlotte, N.C.) (6 S.C. stores)	10.0
Charleston	
Condon's Dept. Store (2 stores)	5.0
Kerrison's Dept. Store (4 S.C. stores)	11.0
Cheraw	
B.C. Moore (B.C. Moore & Sons, Wadesboro, N.D.) (45 stores in North and South Carolina)	48.0
Columbia	
James L. Tapp Co. (4 S.C. stores)	12.0+
J.B. White & Co. (Mercantile stores, New York, N.Y.) (2 stores)	15.0
Greenville	
Meyers-Arnold Co. (9 stores: S.C. 5, N.C. 2, Ga. 2)	26.0
Hartsville	
J.L. Coker (2 S.C. stores)	3.5
Spartanburg	
The Aug. W. Smith Co. (3 S.C. stores)	6.0

DEPARTMENT STORE SALES

SOUTH	Approx. Sales (Millions of $)
TENNESSEE	
Alcoa	
Proffitt's Dept. Stores (4 Tenn. stores)	$ 35.0
Bristol	
H.P. King (2 specialty stores in Tenn.)	3.5
Chattanooga	
Loveman's (5 stores: Tenn. 4, Ga. 1)	22.0
Clarksville	
Parks-Belk Co. (Belk Stores Services, Charlotte, N.C.) (5 stores)	20.0
Jackson	
Kisber's Dept. Store (2 Tenn. stores)	6.0+
Knoxville	
Millers Inc. (Allied Stores, New York, N.Y.) (11 stores: Tenn. 9, Ga. 1, Va. 1)	80.0
Ira A. Watson (17 stores: Ala. 1, Ky. 8, Tenn. 4, Va. 1, W.Va. 3)	41.0
Memphis	
Dillard's (branches of Dillard Dept. Store Div., Little Rock, Ark.) (5 stores)	45 to 50
Nashville	
Cain-Sloan (Allied Stores, New York, N.Y.) (4 stores in Tenn.)	50.0
Castner, Knott Dry Goods Co. (Mercantile Stores, New York, N.Y.) (10 stores: Ala. 2, Ky. 1, Tenn. 7)	140.0
The Harvey Co. (8 stores: Ky. 1, Tenn. 7 incl. warehouse store)	32.0
Downtown Nashville (to be closed Jan. 1984)	4.0
TEXAS	
Abilene	
Thornton's Department Stores (P.N. Hirsch & Co., St. Louis, Mo.) (7 Tex. stores)	10.0
Austin	
Scarbrough's (4 Texas department stores plus 2 boutiques)	25.0
Beaumont	
The Fair Inc. (24 specialty stores: Tex. 18, La. 6) (Also operates a wholesaling business)	26.0
White House Co. (Boston Stores D.G. Co., Fort Smith, Ark.) (3 stores: Tex. 2, La. 1)	20.0

DEPARTMENT STORE SALES

SOUTH	Approx. Sales (Millions of $)
TEXAS	
Dallas	
Dillard Department Stores, Central Division, Fort Worth	
Dallas-Fort Worth (11 stores)	$ 118.0
Valley View	34.0
(Mesquite store opened August 1982)	
Frost Bros. (Frost Bros., San Antonio, Tex.)	
NorthPark (To be enlarged)	6.0+
Joske's-Dallas/Phoenix (Allied Stores, New York, N.Y.) (12 stores: Texas 10, Ariz. 2)	110 to 115
Dallas area (10 stores)	100.0+
NorthPark	27.0
Lord & Taylor (Lord & Taylor, New York, N.Y.) (3 stores)	31.7
NorthPark	16.0
Prestonwood Town Center	12.5
Collin Creek Mall, Plano	3.2
Marshall Field (Marshall Field, Chicago, Ill.)	
Galleria (opened Oct. 1982) Expected 1st year volume:	25.0
Montgomery Ward (Montgomery Ward, Chicago, Ill.)	
Dallas-Fort Worth Area (12 stores)	135 to 140
Neiman-Marcus (Carter Hawley Hale, Los Angeles, Calif.) (18 specialty stores: Tex. 5, Ga. 1, Fla. 2, Md. 1, N.Y. 1, Ill. 2, Mo. 1, Cal. 4, Nev. 1)	450.0
Dallas-Fort Worth Area (4 stores)	150.0
NorthPark (to be enlarged in 1983)	53.0
Prestonwood Town Center	27.0
Other Neiman-Marcus stores (available 1982 estimates)	
Galleria, Houston, Texas	60.0
Fashion Valley, San Diego, Calif.	12.0
Beverley Hills, Calif.	39.5
Newport Beach, Calif.	15.0
San Francisco, Calif. (opened Nov. 1982) 2-month total:	14.0
Northbrook, Chicago, Ill.	27.1
Oakbrook, Chicago, Ill.	13.0
(In addition to the San Francisco store, new store openings in 1982 included a Fort Lauderdale, Fla. unit, in September 1983 openings included: Houston, (Feb.); Michigan Ave., Chicago (Nov.), which is expected to have a 1st year volume of $40 million. A Boston, Mass. store opening is scheduled for Feb. 1984)	
J.C. Penney (15 stores) (sales including catalog which represented 25%)	180.0
NorthPark	27.0
Sakowitz (Sakowitz Inc., Houston, Tex.) (1 store) (also five boutiques)	14 to 18

(Dallas Area continued)

DEPARTMENT STORE SALES

SOUTH	Approx. Sales (Millions of $)
TEXAS	
Dallas (continued)	
Sanger-Harris (Federated Department Stores, Cincinnati, Ohio) (14 stores: Tex. 13, Okla. 1) (In October 1982 Sanger-Harris was assigned responsibility for Levy's, Tucson, Ariz., which had a volume of $39.3 million in 1982 in 2 stores)	$ 329.2
Valley View Center	60.0
(A Tulsa, Okla. store was opened in August 1982; a second Tulsa store will open in 1983)	
Sears, Roebuck (Sears, Roebuck, Chicago, Ill.) (13 stores)	286.0
Valley View	45 to 50
Target Stores (Dayton-Hudson, Minneapolis, Minn.)	
Dallas-Fort Worth (11 stores)	190.0
(1982 store openings in Dallas Galleria, October: Saks Fifth Ave. --expected annual volume 1st year: $20 million; Marshall Field--expected annual volume 1st year: $25 million. A Bloomingdale's store opened in Valley View Center in October 1983, which is planned to reach a volume of $57 million the first year)	
Denison	
Lilley's Inc. (2 specialty stores)	4.2
El Paso	
Popular Dry Goods Co. (3 El Paso stores)	30.0
The United Inc. (10 stores: Ariz. 2, N.M. 2, N.Y. 1, Tex. 5)	5.0
The White House (The Dunlap Co., Fort Worth, Tex.) (2 stores: Tex. 1, N.M. 1)	15.0
Fort Worth (also see Dallas listings)	
R.E. Cox & Co. (5 stores in Texas, including 3 in Fort Worth)	25 to 30
Dillard Dept. Stores-Central Division (Dillard Dept. Stores Inc., Little Rock, Ark.) (26 stores: Kans. 2, Mo. 1, Okla. 8, Tex. 15)	300.0+
Dallas-Fort Worth area (11 stores)	118.0
Monnig's (9 stores in Texas)	40.0
Pace, Newsom & Moates Inc. (29 general merchandise stores in Texas)	25.0
Striplings & Cox (The Dunlap Co., Fort Worth, Tex.) (3 stores)	25.0+
Galveston	
Eiband's Dept. Store (1 store)	5.0
(Also operates a specialty store in Galveston)	
Houston	
Foley's (Federated Dept. Stores, Cincinnati, Ohio) (14 stores in Texas plus a warehouse operation)	597.7
(2 stores were opened in 1982--Austin and San Antonio; another San Antonio store opened in 1983.)	
Joske's-Houston (Allied Stores, New York, N.Y.) (10 Texas stores)	125.0

(Houston Area continued)

DEPARTMENT STORE SALES

SOUTH

TEXAS

	Approx. Sales (Millions of $)
Houston (continued)	
Kaplan's Dept. Store (1 store)	$ 2.3
Leonard's Dept. Stores (9 stores)	8.0
Lord & Taylor (Lord & Taylor, New York, N.Y.) (3 stores) (The Galleria store is undergoing renovation and expansion, which is expected to boost sales to $26 million in 1st year. A 4th store, at West Oaks, is to be opened in Feb. 1984. It is expected to have a volume of $10 million in the 1st year of operation.)	39.0
Marshall Field (Marshall Field, Chicago, Ill.) (1 store)	
Galleria (Town & Country Center store opened Feb. 1983)	30.0
Neiman-Marcus (Neiman-Marcus, Dallas, Tex.) (1 store)	
Galleria (Town & Country Center store opened Feb. 1983)	60.0
Sakowitz Inc. (15 specialty stores, incl. 4 full-line stores in Houston plus 2 smaller units and 3 boutiques; 1 store in Amarillo, 1 in Dallas plus hotel boutiques; Scottsdale, Ariz. 1) (A Midland, Tex. store was opened in Feb. 1982. A Tulsa, Okla. store is to open Feb. 1984 followed by a 2nd store in that city in the summer of 1984)	180.0
Saks Fifth Avenue (Saks Fifth Avenue, New York, N.Y.) (1 store) (A 2nd store--West Oaks Mall--was opened Aug. 13. Expected 1st year volume: $12-$13 million)	30.0+
Laredo	
Richter's Dept. Store (2 stores)	10.0
Lubbock	
Hemphill-Wells Co. (4 Texas stores)	25.0+
Midland	
Grammer-Murphy, Inc. (1 store)	5.0
San Antonio	
Dillard Department Stores, Texas-New Mexico Division (Dillard Dept. Stores, Little Rock, Ark.) (21 stores: Texas 18, New Mexico 3)	203.0
Frost Bros. (Manhattan Industries, New York, N.Y.) (11 specialty stores in Texas)	110.0
Joske Bros. (Allied Stores, New York, N.Y.) (7 Tex. stores)	85.0
La Feria Dept. Stores (6 Texas stores)	15.0
Waco	
R.E. Cox, Fort Worth, Texas	10.0
Wichita Falls	
McClurkan's Dept. Store (4 Tex. stores)	10.0

DEPARTMENT STORE SALES

SOUTH

	Approx. Sales (Millions of $)
VIRGINIA	
Arlington (also see DISTRICT OF COLUMBIA listings)	
Morton's (6 stores in D.C., Md.)	$ 10.0
Lawrenceville	
W.S. Peebles & Co. (43 stores plus wholesaling operation)	65.0
Martinsville	
Globman's Stores (3 stores: Va. 2, N.C. 1)	10.0
Norfolk	
Rice's-Nachmans (Phillips-Van Heusen Corp., New York, N.Y.) (8 specialty stores in Va.)	12.0
Smith & Welton (8 Va. stores)	18.0
Richmond	
Miller & Rhoads (Allied Stores, New York, N.Y.) (22 stores: Va. 17, N.C. 5)	110.0
Southern Dept. Stores, Inc. (6 stores)	5.0+
Thalhimer Bros. (Carter Hawley Hale, Los Angeles, Calif.) (25 stores: Va. 14, N.C. 10, S.C. 1) (A Memphis, Tenn. store opened in 1983)	206.0
Roanoke	
S.H. Heironimus Co. (4 Va. stores)	12.0+
Williamsburg	
Casey's Inc. (Southern Department Stores, Richmond, Va.) (1 store)	3.0+
WEST VIRGINIA	
Charleston	
A.W. Cox Dept. Store (16 stores: Ky. 5, Oh. 1, W.Va. 10)	10.0+
The Diamond Dept. Store (Associated Dry Goods, New York, N.Y.) (2 stores in W.Va.)	20.0
O.J. Morrison Dept. Stores (1 store)	2.5
Fairmont	
Hartley's Dept. Store (1 store)	4.0
Holden	
Island Creek Stores Co. (14 stores in W.Va., Va., Ky.)	8.0
Logan	
Sayer Bros. (S. & B. Wholesale Distributors) (5 stores)	7.0
Parkersburg	
Dils Bros. (2 W. Va. stores)	7.0

DEPARTMENT STORE SALES

	Approx. Sales (Millions of $)
SOUTH	
WEST VIRGINIA	
Wheeling	
Goods Department Store Inc. (1 store)	$ 3.5
Stone & Thomas (14 department stores in W. Va.) (Also operates Crone's men's specialty stores)	75.0
WEST	
ARIZONA	
Douglas	
Phelps Dodge Mercantile Co. (6 stores: Ariz. 4, N.M. 2)	25.0+
Flagstaff	
Babbitt Bros. Trading Co. (9 Arizona stores)	12.0
Nogales	
Capin Mercantile Corp. (3 Ariz. department stores plus 13 specialty stores)	15.0
Phoenix/Scottsdale Area	
Broadway-Southwest, Mesa (Carter Hawley Hale, Los Angeles, Calif.) (10 stores: Ariz. 7, Nev. 2, N.M. 1)	120.0
Diamond's, Tempe (Dayton-Hudson, Minneapolis, Minn.) (13 stores: Ariz. 10, Nev. 3)	143.0
Goldwater's, Scottsdale (Associated Dry Goods, New York, N.Y.) (9 stores: Ariz. 7, N.M. 1, New. 1)	91.0
Joske's (Joske's, Dallas, Tex.) (2 stores in Phoenix)	10 to 15
Malcolm's Dept. Store, Phoenix (2 stores)	3.3
Tucson	
Levy's of Tucson (Assigned to Sanger-Harris Div. of Federated in Oct. 1982) (2 Tucson stores--the 2nd opened in 1982	39.3
Steinfeld's (3 Ariz. stores)	5.5
CALIFORNIA	
Alhambra	
Lieberg's (2 stores)	3.0
Bakersfield	
Brock's Dept. Store (2 stores)	17.0
Berkeley	
Hink's Department Store (1 store)	6.0
Burlingame	
J.M. McDonald Co. (10 stores)	30.0

DEPARTMENT STORE SALES

WEST	Approx. Sales (Millions of $)
CALIFORNIA	
Carmichael	
Lawrence's Dept. Store (4 stores)	$ 7.0
Carson	
The Boston Stores Inc. (12 stores: Ariz. 2, Calif. 10)	23.0
Castro Valley	
Daughtrey's Dept. Store (3 Calif. stores)	13.0
Eureka	
Daly's (3 Calif. stores)	4.5
Fresno	
E. Gottschalk & Co. (7 stores in Calif., incl. Fashion Fair, 14 Bobbie West stores and Village East specialty stores)	94.6
Fresno area (3 stores)	60.0
(A replacement store for the Merced unit was opened March 1983. Projected 1st year volume: $10.0 million)	
(Macy's California opened a store in the Fashion Fair Mall, Fresno, in August 1983. Planned 1st year volume: $32 million)	
Glendale	
H.S. Webb & Co. (2 Calif. stores)	5.5
(Nordstrom opened a unit in Glendale--its 5th Southern California store--in August 1983. Expected 1st year volume: $34 million)	
Huntington Park	
Windeman's Dept. Store (5 Calif. stores)	12.0
Los Angeles/Long Beach Area	
Broadway-Southern California (Carter Hawley Hale, Los Angeles, Calif.) (40 stores)	690.0
Anaheim	15.0
Bakersfield	13.0
Beverly Center (opened in March 1982)	18.5
Brea	15.5
Carlsbad	11.5
Carson	10.0
Century City	26.0
Cerritos	17.5
Chula Vista	15.5
Crenshaw	8.7
Del Amo	32.0
Downey	17.0
Fox Hills	19.0
Glendale	26.0
Grossmont	15.5
Hawthorne	11.0

(Los Angeles/Long Beach Area continued)

DEPARTMENT STORE SALES

WEST

	Approx. Sales (Millions of $)
CALIFORNIA	
Los Angeles/Long Beach Area (continued)	
Broadway-Southern California (continued)	
Hollywood (closed in November 1982)	$ 6.0
Huntington Beach	19.2
La Jolla	14.8
Laguna Hills	17.0
Long Beach	13.8
Los Angeles (downtown)	23.0
Montclair	15.0
Newport Beach	15.4
Northridge	24.0
Orange	17.0
Panorama City	18.5
Pasadena	14.0
Puente Hills	16.0
Riverside	12.6
San Bernardino	13.5
San Diego (5 stores)	24.0
Santa Anita	19.0
Sherman Oaks	20.7
Thousand Oaks	13.6
Topanga Plaza	17.8
Ventura	15.4
West Covina	16.4
Westchester	9.0
Whittier	10.6
(An estimated total of $8.0 million was realized in mail, phone, and warehouse volume in 1982.)	
Buffum's, Long Beach (11 junior department stores and 4 Buffum's Sportswear Shops)	109.0
Long Beach Plaza (replacement hdqtr. store)	9.0
Bullock's (Southern California)(including Bullock's Wilshire) (Federated Department Stores, Cincinnati, Ohio (26 stores)	517.9
Bullock's (excluding mail order and warehouse volume, as well as Bullock's Wilshire) (20 stores)	431.3
Beverley Center (opened Feb. 1982)	22.4
Carlsbad	10.1
Century City	24.2
Christown	10.9
Del Amo	30.6
La Habra	12.8
Lakewood	18.4
Las Vegas	14.9
Los Angeles (downtown) closed in June 1983. (Executive offices were moved to a new L.A. building in 1982. A Citicorp Plaza store will open by Fall 1986.)	16.0
Manhattan Beach (opened February 1982)	13.1
Mission Viejo	11.6

(Los Angeles/Long Beach Area continued)

DEPARTMENT STORE SALES

WEST

CALIFORNIA

Los Angeles/Long Beach Area (continued)

	Approx. Sales (Millions of $)
Bullock's (continued)	
Northridge	$ 22.7
Pasadena	33.0
San Diego	22.6
Santa Ana	20.5
Scottsdale, Arizona	15.7
Sherman Oaks	45.0
South Coast Plaza	39.0
West Covina	13.3
Westwood	34.5
(Opened stores in Thousand Oaks, La Mesa and Palm Desert, Calif. in 1983. The Palm Desert store is expected to do $15 million its first year)	
Bullock's Wilshire (6 stores)	71.1
Wilshire Boulevard	29.2
Palm Springs	6.6
Woodland Hills	11.0
Newport Beach	10.8
La Jolla	7.5
Palos Verdes	6.0
Contempo Casuals (Carter Hawley Hale, Los Angeles, Calif.) (66 stores)	54.0
Harris Co., San Bernardino (5 stores)	45.0
H.C. Henshey Co., Santa Monica (2 stores)	10.0
Hinshaw's Dept. Stores, Whittier (2 stores)	25.0
Ivers Dept. Store (2 Calif. stores)	7.2
Judy's Inc., Van Nuys (74 specialty stores)	39.6
I. Magnin (Southern Division of I. Magnin & Co., San Francisco (10 specialty stores)	96.0
Beverly Hills	26.0
South Coast Plaza, Costa Mesa	17.0
May Co.-California, Los Angeles (May Dept. Stores, St. Louis, Mo.) (34 stores)	654.5
Arcadia	17.7
Brea	18.5
Buena Park	18.0
Carlsbad	16.4
Cerritos	3.0
Costa Mesa	37.5
Crenshaw	10.6
Eagle Rock	22.5
Eastland	20.6
El Cajon	13.2
Fox Hills	20.6
La Jolla	11.5
Lakewood	29.5

(Los Angeles/Long Beach Area continued)

DEPARTMENT STORE SALES

WEST

CALIFORNIA

Los Angeles/Long Beach Area (continued)

	Approx. Sales (Millions of $)
May Co. (continued)	
Laurel Plaza (To be remodeled and enlarged, will house headquarters office)	$ 29.7
Los Angeles (downtown) (Headquarters will be moved to Laurel Plaza in 1983)	30.0
Mission Viejo	15.0
Montclair	16.0
Oxnard	13.3
Palm Desert (opened Oct. 1982) Annual rate:	7.1
Palos Verdes	10.0
Pasadena	6.2
Plaza Bonita	12.5
Redondo Beach	33.5
Riverside	13.8
San Bernardino	14.6
San Diego	19.3
Sherman Oaks	14.8
The City	14.7
Thousand Oaks	17.2
Topanga Plaza, Canoga Park	25.5
Westland	27.0
Westminster	25.0
Whittier	11.8
Wilshire Boulevard	29.5
Plans are underway for a new store in Citicorp Plaza, L.A.)	
Mervyn's, Hayward (Dayton Hudson, Minneapolis, Minn.) (92 soft goods stores: Calif. 66, Ariz. 8, Utah 6, Nev. 4, Ore. 3, Tex. 3, N.M. 1, Wash. 1)	1,335.8
28 Southern Calif. stores, incl. 7 opened in 1982	250.0
Montgomery Ward (Marcor Inc., New York, N.Y.)	180.0
Neiman-Marcus (Neiman-Marcus, Dallas, Tex.) (2 specialty stores)	54.5
Beverly Hills	39.5
Newport Beach	15.0
Nordstrom (Nordstrom's, Seattle, Wash.) (4 Southern Calif. stores)	123.0
South Coast Plaza, Costa Mesa	49.0
Brea	20.0
Cerritos	20.0
San Diego	34.0
J.C. Penney (24 full-line and 27 smaller stores in Southern Calif.)	617.0
J.W. Robinson (Associated Dry Goods, New York, N.Y.) (21 stores in Calif.)	415.5
Downtown Los Angeles	26.6
Anaheim	12.0
Arcadia (Santa Anita)	15.5
Beverly Hills	38.1
Cerritos	17.0
Del Amo	25.5

(Los Angeles/Long Beach Area continued)

DEPARTMENT STORE SALES

WEST

	Approx. Sales (Millions of $)
CALIFORNIA	
Los Angeles/Long Beach Area (continued)	
J.W. Robinson (continued)	
Glendale	$ 18.0
Mission Viejo	10.0
Newport Beach	29.5
Palm Springs	5.0
Panorama City (San Fernando Valley)	11.5
Pasadena	18.0
Puente Hills	18.0
San Diego (Fashion Valley)	22.0
Santa Barbara	31.0
Santa Monica	24.0
Sherman Oaks	14.0
Thousand Oaks	16.0
University Town Center	18.0
Westminster	17.5
Woodland Hills	31.3
Saks Fifth Avenue (Saks Fifth Avenue, New York, N.Y.) (5 stores in Southern Calif.)	71.0
Beverly Hills	29.0
South Coast Plaza, Costa Mesa	14.5
Woodland Hills	17.5
La Jolla and Palm Springs (2 stores)	10.0
(A 2nd San Diego branch was opened in Aug. 1982; expected volume of $12 million in 3 years)	
Sears, Roebuck (Sears, Roebuck & Co., Chicago, Ill.)	800.0
Wilson's (acquired by Melville Corp., Harrison, N.Y. in April 1982) (88 stores)	37.4
(Bonwit Teller (New York) opened a branch in Palm Desert, Palm Springs, Calif. in Oct. 1983; expected 1st year volume: $10-$15 million.)	
Marysville	
Bradley's (3 stores)	3.5
Modesto	
C.H. Dunlap (2 specialty stores in Calif. Also operates Hink's Dept. Store, Berkeley)	11.0
Pacific Grove	
Holman's Dept. Store Inc. (3 stores)	12.0
Redding	
C.M. Decker Inc. (1 store)	3.0
Sacramento	
Weinstock's (Carter Hawley Hale, Los Angeles, Calif.) (12 stores: Calif. 8, Nev. 1, Utah 3)	160.0

DEPARTMENT STORE SALES

WEST

CALIFORNIA

San Bernardino

	Approx. Sales (Millions of $)
Harris Co. (5 Calif. stores)	$ 45.0

San Diego (also see Los Angeles listings)

	Approx. Sales (Millions of $)
Neiman-Marcus (Neiman-Marcus, Dallas, Tex.)	12.0
Fashion Valley	
Nordstrom (Nordstrom Inc., Seattle, Wash.)	
Fashion Valley	34.0
(3 additional area stores to be opened in 1984/1985)	
Walker Scott (13 department and specialty stores in Southern Calif.)	45.5
(Saks Fifth Ave. opened its 2nd San Diego branch in Sept. 1983 in Mission Valley Center. Expect to reach an annual rate of $12 million in 3 years)	

San Francisco/Oakland/Palo Alto

	Approx. Sales (Millions of $)
Bullock's-Northern California, Palo Alto (Federated Dept. Stores, Cincinnati, Ohio) (6 Calif. stores)	93.0
(This store group is to be liquidated. Nordstrom (Seattle), Carter Hawley Hale and Mervyn's (Dayton Hudson) plan to buy units. Fashion Island, San Mateo store will operate through 1983)	
Emporium Capwell (Carter Hawley Hale, Los Angeles, Calif.) (20 Calif. stores)	481.0
(Opened a store in Fairfield, Calif. in 1983)	
Hastings (Hartmarx Retail, New York, N.Y.) (15 men's specialty stores)	22.0
Liberty House, Oakland (Amfac Inc., Honolulu, Hawaii) (22 dept. stores: Hawaii 8, No. Calif. & Nev., 14)	269.0
Calif. & Nev. stores (14)	140.0
(2 stores: Hayward & Dublin, closed Jan. 1983. South Gate Mall, Sacramento & Concord are to be closed)	
Macy's California (R.H. Macy, New York, N.Y.) (21 stores: Calif. 20, Nev. 1, plus 2 Clearance Centers)	825.0
(Fashion Fair, Fresno, Calif. store opened Aug. 1983. Planned 1st year volume: $32 million. Solano and Corte Madera, Calif. stores are to open in 1984)	
I. Magnin (Federated Dept. Stores, Cincinnati, Ohio) (25 specialty stores: Calif. 18, Ariz. 1, Ore. 1, Wash. 1, Ill. 3, Md. 1)	256.3
Northern California	100.0+
Union Square, San Francisco (Major renovation completed in 1982.)	55.0
Southern Division (Los Angeles)	96.0
Joseph Magnin (Acquired by Hillman Co. and Nicholar Wallner, La Jolla) (23 specialty stores plus franchised Gucci operations)	80.0
Neiman Marcus (Neiman Marcus, Dallas, Tex.) (San Francisco store opened in Nov. 1982) (Plan $40 mil. in 1st year.)	
2-month total:	14.0

(San Francisco/Oakland/Palo Alto Area continued)

DEPARTMENT STORE SALES

WEST

	Approx. Sales (Millions of $)
CALIFORNIA	
San Francisco/Oakland/Palo Alto (continued)	
Ross Stores Inc. (8 Calif. stores)	$ 15.0
Saks Fifth Avenue (Saks Fifth Avenue, New York, N.Y.) Union Square Store	30.0
Topps & Trowsers (74 stores)	18.7
Victoria's Secret (The Limited (6 Calif. stores) (Will add 10 stores in 1983)	7.0
(Nordstrom opened its first Northern Calif. store in Oct. 1982)	
San Luis Obispo	
Riley's Dept. Store (4 Calif. stores)	7.0
San Mateo	
Levy Brothers Dept. Store (7 Calif. stores)	5.0
Santa Cruz	
Samuel Leask (3 Calif. stores)	5.0
Santa Monica	
H. C. Henshey Co. (2 Calif. stores)	10.0
Stockton	
Brown & Mahin (3 stores)	3.0
Watsonville	
Charles Ford & Co. (5 Calif. department stores and 5 specialty stores in Calif.)	18.0
Whittier	
Hinshaw's Dept. Stores Inc. (2 Calif. stores)	26.0
COLORADO	
Denver	
The Denver Dry Goods Co. (Associated Dry Goods, New York, N.Y.) (12 Colorado stores of which 5 are being renovated) (A 13th store will be opened in March 1983 in Southwest Plaza, Denver)	128.0
A.G. Eaker Co. (25 stores)	20.0
Fashion Bar (73 specialty stores)	100.0
Joslin Dry Goods, Englewood (Mercantile stores, New York, N.Y.) (7 Colo. stores) (A Southwest Denver store was opened in February 1983; a Cheyenne, Wyo. store in summer 1983)	125.0
May-D & F (May Dept. stores, Denver, Colo.) (10 Colo. stores) (Opened a Boulder, Colo. store in 1983)	135.0
Montgomery Ward (5 metropolitan area stores)	75 to 90
Neusteters (4 Colo. stores)	15 to 20
J.C. Penney (9 metropolitan area stores)	100.0

(Denver Area continued)

DEPARTMENT STORE SALES

WEST	Approx. Sales (Millions of $)
COLORADO	
Denver	
Sears Roebuck (5 metropolitan area stores)	$ 100.0+
Target (9 metropolitan area stores)	100.0
(Carter Hawley Hale plans to open 4 Broadway-Southwest stores in the metro area--2 by 1985)	
IDAHO	
Boise	
The Bazaar (2 stores)	7.0
The Mode (2 stores)	5.0
Shaver's Inc. (4 stores in Idaho)	8.5
MONTANA	
Billings	
Hart-Albin (2 dept. stores plus a men's store & a book store)	10.0
Glendive	
Anderson's Inc. (3 stores)	2.5
OREGON	
Portland	
Meier & Frank (May Department Stores, St. Louis, Mo.) (7 stores: Oregon 6, Wash. 1)	176.5
UTAH	
Salt Lake City	
ZCMI Department Store (Zion's Co-Operative Mercantile Institution) (8 stores: Utah 7, Idaho 1)	141.3
WASHINGTON	
Seattle/Everett/Spokane Area (The Northwest)	
The Bon (Allied Stores, New York, N.Y.) (35 stores plus Seattle home store: Wash. 17, Ore. 6, Id. 7, Mont. 3, Utah 3)	400.0
Seattle Met. Area (8 stores)	234.0
Northgate (largest unit)	48.0
(A Belleview Sq. unit will be opened in 1984; the 1st Wyoming unit will be opened in 1983 in Casper)	
The Crescent (Batus Inc., New York, N.Y.) (3 Spokane stores)	45.0
Eddie Bauer (General Mills) (26 stores plus mail order which generates about 40% of volume)	80.0
Downtown Seattle store	3.0
Frederick & Nelson, Seattle (Batus Inc., New York, N.Y.) (15 stores: Wash. 8, Ore. 7)	210.0
Lamont's Apparel Stores, Seattle (Pay 'n Save Corp.) (23 stores in Wash., Alaska, Ore., Id.)	108.3
Nordstrom's (Nordstrom Inc., Seattle)	
Seattle area stores (7)	198.0
Downtown	50.0

DEPARTMENT STORE VOLUME LEADERS

Following is a compilation of leading department stores, listed by buying or divisional headquarter location, and showing the best available information on sales for the year 1982 (or closest fiscal period) attributed to each headquarter operation. The volume figures cover sales of all stores (confined to department stores where possible) operated by the listed store. Not included in this list are national chains, such as Sears, Ward and Penney, promotional chains, such as K mart and national chain department stores without divisional buying operations. (See section on MAJOR NATIONAL/REGIONAL CHAINS)

STORES WITH TOTAL SALES OF $100 MILLION OR MORE

	Sales Volume (Millions of $)
Macy's New York, New York, N.Y. (R.H. Macy) (16 stores plus furniture clearance and auto centers) Fiscal year ending July 1983:	$ 1,043.0
Bamberger's, Newark, N.J. (R.H. Macy) (23 stores plus furniture clearance and auto centers)	975.0
Macy's California, San Francisco, Calif. (R.H. Macy) (21 stores)	825.0
Broadway Southern California, Los Angeles, Calif. (Carter Hawley Hale) (40 stores)	690.0
J. L. Hudson, Detroit, Mich. (Dayton-Hudson) (20 stores)	683.8
Bloomingdale's, New York, N.Y. (Federated) (12 full-line department stores)	680.5
May Company-California, Los Angeles, Calif. (May Department Stores) (34 stores)	654.5
Abraham & Straus, Brooklyn, N.Y. (Federated) (15 stores)	650.5
Marshall Field, Chicago, Ill. (Batus Inc.)(20 stores)	605.0
Foley's, Houston, Tex. (Federated) (14 stores)	597.7
Burdine's, Miami, Fla. (Federated) (23 stores)	582.8
Lord & Taylor, New York, N.Y. (Associated Dry Goods) (38 stores)	558.0+
Bullock's Southern California, Los Angeles, Calif. (Federated) (26 stores)	517.9
Alexander's Inc., New York, N.Y. (Alexander's Dept. Stores Inc.)(16 stores)	511.4
Emporium Capwell, San Francisco, Calif. (Carter Hawley Hale) (20 stores)	481.0
Dayton's Department Store, Minneapolis, Minn. (Dayton Hudson) (13 stores plus 3 homefurnishings stores)	437.3
Bullock's, Los Angeles, Calif. (Federated) (20 stores not including Bullock's Wilshire)	431.3

DEPARTMENT STORE VOLUME LEADERS

STORES WITH SALES OF $100 MILLION OR MORE (continued)

	Sales Volume (Millions of $)
Rich's Inc., Atlanta, Ga. (Federated) (16 stores)	$ 430.1
Gimbel's East, Gimbel's New York and Gimbel's Philadelphia combined, New York, N.Y. (Batus Inc.) (20 stores)	417.0
Hecht's, Washington, D.C. (May Department Stores Co.) (24 stores)	415.6
J.W. Robinson Co., Los Angeles, Calif. (Associated Dry Goods)(21 stores)	415.5
Jordan Marsh Co., Boston, Mass. (Allied Stores) (14 stores)	410.0
The Bon, Seattle, Wash. (Allied Stores) (35 stores plus Seattle home store)	400.0
F & R Lazarus, Columbus, Ohio (Federated) (17 stores)	389.3
Filene's, Boston, Mass. (Federated) (14 department stores, 8 basement stores)	372.8
Famous Barr, St. Louis, Mo. (May Department Stores) (15 stores)	363.5
Woodward & Lothrop Inc., Washington, D.C. (16 stores)	357.5
John Wanamaker, Philadelphia, Pa. (Carter Hawley Hale) (16 stores)	350.0
Shillito Rikes, Cincinnati, Ohio (Federated) (14 stores)	342.9
Sanger Harris, Dallas, Tex. (Federated) (14 stores)	329.2
B. Altman, New York, N.Y. (The Altman Foundation) (7 stores)	329.0
Carson Pirie Scott & Co., Chicago, Ill. (24 stores)	323.4
Stern's/Gertz, Paramus, N.Y. (Allied Stores) (16 stores)	310.0
Dillard Dept. Stores-Central Division, Fort Worth, Tex. (Dillard Dept. Stores, Little Rock, Ark.) (26 stores)	300.0
Strawbridge & Clothier, Philadelphia, Pa. (Allied Stores) (12 stores not including Clover Stores)	290.0
Maas Bros., Tampa, Fla. (Allied Stores)(20 stores)	270.0
Liberty House of Calif., Oakland, Calif. (Amfac) (22 stores)	269.1
Kaufmann's, Pittsburgh, Pa. (May Department Stores) (10 stores)	268.6
C.J. Gayfer Co., Mobile, Ala. (Mercantile Stores) (12 stores)	250.0

DEPARTMENT STORE VOLUME LEADERS

STORES WITH SALES OF $100 MILLION OR MORE (continued)

	Sales Volume (Millions of $)
Davison's, Atlanta, Ga. (R.H. Macy) (13 stores)	$ 250.0
D. H. Holmes Co. Ltd., New Orleans, La. (15 stores)	240.7
Jordan Marsh-Florida, Miami, Fla. (Allied Stores) (14 stores)	240.0
McAlpin Co., Cincinnati, Ohio (Mercantile Stores) (9 stores)	240.0
Hess's Inc., Allentown, Pa. (Crown American Corp.) (29 stores)	239.6
The Higbee Co., Cleveland, Ohio (11 stores)	215.2
Frederick & Nelson, Seattle, Wash. (Batus Inc.) (15 stores)	210.0
Dillard's Little Rock Division, Little Rock, Ark. (18 stores)	208.0
Thalhimer Bros. Inc., Richmond, Va. (25 stores)	206.0
Dillard's San Antonio Division, San Antonio, Texas (Dillard Department Stores) (21 stores)	203.0
Macy's Midwest, Kansas City, Mo. (R.H. Macy) (19 stores)	200.0
L. S. Ayres & Co., Indianapolis, Ind. (Associated Dry Goods) (13 stores)	200.0
Elder Beerman Department Store Div., Dayton, Ohio (21 stores)	200.0
The May Co., Cleveland, Ohio (May Department Stores) (10 stores)	189.0
P. A. Bergner, Peoria, Ill. (25 stores)	186.0
Jacobson Stores, Jackson, Mich. (17 stores)	181.3
Wieboldt Stores, Chicago, Ill. (14 stores)	179.1
Meier & Frank, Portland, Ore. (May Dept. Stores) (7 stores)	176.5
Gimbels Midwest, Milwaukee, Wis. (11 stores)	171.0
J. Byron's, Miami, Fla. (Jack Eckerd Corp.) (45 stores)	168.4
Younker Bros. Inc., Des Moines, Iowa (Equitable of Iowa) (29 stores)	166.6
Boscov's Dept. Stores, Reading, Pa. (9 stores)	165.0
Joseph Horne, Pittsburgh, Pa. (Associated Dry Goods) (13 stores plus 2 Boston Stores)	165.0

DEPARTMENT STORE VOLUME LEADERS

STORES WITH SALES OF $100 MILLION OR MORE (continued)

	Sales Volume (Millions of $)
Weinstock's, Sacramento, Calif. (Carter Hawley Hale) (12 stores)	$ 160.0
Sibley Lindsay & Curr Co., Rochester, N.Y. (Associated Dry Goods) (15 stores)	160.0
Goudchaux/Maison Blanche (Goudchaux's Inc.) Baton Rouge, La. (6 stores)	155.8
G. Fox & Co., Hartford, Conn. (May Dept. Stores) (8 stores)	152.6
The Jones Co., Kansas City, Mo. (Mercantile Stores) (7 stores)	150.0
Gimbels, Pittsburgh, Pa. (Batus Inc.) (7 stores)	148.0
Diamond's, Tempe, Ariz. (Dayton-Hudson) (13 stores)	143.0
ZCMI, Salt Lake City, Utah (8 stores)	141.3
The M. O'Neil Co., Akron, Ohio (May Dept. Stores) (10 stores)	140.1
Castner Knott Dry Goods Co., Nashville, Tenn. (Mercantile Stores) (10 stores)	140.0
Kohl's Department Stores, Brookfield, Wis. (Batus Inc.) (25 stores)	140.0
Stix, Baer & Fuller, St. Louis, Mo. (Associated Dry Goods) (12 stores)	139.4
May-D & F, Denver, Colo. (May Dept. stores) (10 stores)	135.0
Goldsmith's, Memphis, Tenn. (Federated) (6 stores)	130.8
Glosser Bros., Johnstown, Pa. (1 store)	130.0
Denver Dry Goods Co., Denver, Colo. (Associated Dry Goods) (12 stores)	128.0
Joske's, Houston, Tex. (Allied Stores) (10 stores)	125.0
Joslin Dry Goods, Englewood, Colo. (Mercantile Stores) (7 stores)	125.0
McRae's, Jackson, Miss. (13 stores)	124.4
Broadway-Southwest Div., Mesa, Ariz. (Carter Hawley Hale) (10 stores)	120.0
Boston Store, Milwaukee, Wis. (Federated) (8 stores)	117.9
Gayfers, Montgomery, Ala. (Mercantile Stores) (6 stores)	115.0
Joske's-Dallas/Phoenix, Dallas, Tex. (Allied Stores) (12 stores)	112.0

DEPARTMENT STORE VOLUME LEADERS

STORES WITH SALES OF $100 MILLION OR MORE (continued)

	Sales Volume (Millions of $)
Miller & Rhoads Inc., Richmond, Va. (Allied Stores) (22 stores)	$ 110.0
Howland Steinbach, White Plains, New York (Supermarkets General) (28 stores)	110.0
Buffum's, Long Beach, Calif. (15 stores incl. 11 junior department stores)	109.0
Prange's, Green Bay & Sheboygan, Wis. (19 stores)	107.0
Hahne & Co., Newark, N.J. (Associated Dry Goods) (8 stores)	105.0
Iveys-Carolinas, Charlotte, N.C. (Batus Inc.) (14 stores)	105.0
Strouss, Youngstown, Ohio (May Department Stores) (10 stores)	100.5
Donaldson's, Minneapolis-St. Paul, Minn. (Allied Stores) (9 stores)	100.0
J. B. White, Augusta, Ga. (Mercantile Stores) (4 stores)	100.0

STORES WITH SALES OF $50-TO-$99 MILLION

May's, Brooklyn, New York (J. W. Mays Inc.) (4 stores)	98.0
Adam, Meldrum & Anderson, Buffalo, N.Y. (10 stores)	97.0
J. Bacon & Co., Louisville, Ky. (Mercantile Stores) (6 stores)	95.0
J. L. Brandeis & Sons, Omaha, Neb. (10 stores)	95.0
E. Gottschalk, Fresno, Calif. (7 stores)	94.6
Bullock's-Northern Calif., Palo Alto, Calif. (Federated) (6 stores)	93.0
Goldwaters, Scottsdale, Ariz. (Associated Dry Goods) (9 stores)	91.0
John A. Brown Co., Oklahoma City, Okla. (Dayton Hudson) (6 stores)	86.1
Iveys' Florida, Winter Park, Fla. (Batus Inc.) (10 stores)	85.0
Joske's, San Antonio, Tex. (Allied Stores) (8 stores)	85.0
McCurdy & Co., Rochester, N.Y. (6 stores)	85.0
Pizitz, Birmingham, Ala. (11 stores)	82.5

DEPARTMENT STORE VOLUME LEADERS

STORES WITH SALES OF $50-TO-$99 MILLION (continued)

	Sales Volume (Millions of $)
Wm. H. Block & Co., Indianapolis, Ind. (Allied Stores) (9 stores)	$ 80.0
The Lion Dry Goods Co., Toledo, Ohio (Mercantile Stores) (3 department stores and 2 specialty stores)	80.0
Millers Inc., Knoxville, Tenn. (Allied Stores) (11 stores)	80.0
Robinson's of Florida, Winter Park, Fla. (Associated Dry Goods) (7 stores)	80.0
Crowley Milner & Co., Detroit, Mich. (10 stores)	76.4
Hochschild Kohn Inc., Baltimore, Md. (Supermarkets General) (10 stores)	75.9
Hutzler's, Baltimore, Md. (8 stores)	75.0
Stone & Thomas, Wheeling, W. Va. (14 stores)	75.0
H. & S. Pogue, Cincinnati, Ohio (Associated Dry Goods) (5 stores)	72.0
D. M. Read Inc., Bridgeport, Conn. (Allied Stores) (5 stores)	72.0
Pomeroys Inc., Levittown, Pa. (Allied Stores) (9 stores)	70.0
Stewart Dry Goods, Louisville, Ky. (Associated Dry Goods) (7 stores)	66.0
W. S. Peebles & Co., Lawrenceville, Va. (43 stores)	65.0
Stewart & Co., Baltimore, Md. (Caldor Div., Associated Dry Goods) (5 stores)	60.0
West Bros., De Ridder, La. (24 stores)	59.0
May-Cohens, Jacksonville, Fla. (May Dept. Stores) (6 stores)	57.9
Sage Allen, Hartford, Conn. (13 stores)	57.0
Pomeroy's, Harrisburg, Pa. (Allied Stores) (6 stores)	55.0+
United Dept. Stores, Trenton, N.J. (15 stores)	50.0
Cain-Sloan, Nashville, Tenn. (Allied Stores) (4 stores)	50.0
Albert-Steiger Inc., Springfield, Mass. (9 stores)	50.0
S. Grumbacker & Sons, York, Pa. (14 stores)	50.0

MAJOR NATIONAL/REGIONAL CHAINS

The following companies have major positions in general merchandise/apparel retailing--including the operation of traditional department stores, discount stores, apparel specialty stores and catalog operations. Many of these chains are also engaged in non-related activities, including the operation of supermarkets or of specialized hard goods outlets, manufacturing, wholesaling or diverse activities such as the operation of auto repair shops, television stations, etc. The sales volumes reported are total net sales covering all operations unless otherwise noted, and are for the latest fiscal period or period reflecting 1982 volume.

Retail Chain	Sales (Millions of $)
Alexander's, Inc., New York, N.Y. (Volume adjusted for 1982 fiscal year)	$ 511.3
Allied Stores Corp., New York, N.Y.	3,215.6
Almy Stores Inc., Boston, Mass. (Also operates R.H. White's, Worcester, Mass.)	80.0
Ames Department Stores Inc., Rocky Hill, Conn. (To be merged with KDT Industries which operates 25 units, had a volume of $160 million in 1982)	422.8
C.R. Anthony & Co., Oklahoma City, Okla.	396.0
Associated Dry Goods Corp., New York, N.Y. (Includes 79 Caldor units with a volume of $925 million; 173 department stores, 64 Sycamore apparel units with a volume totaling $2.3 billion)	3,188.8
Batus Inc., Retail Divisions, New York, N.Y. (Acquired Marshall Field and J.B. Ivey in 1982) Vol. for full year, excluding supermarkets	2,410.0
L.L. Bean, Freeport, Me.	225.0
Belk Stores, Charlotte, N.C.	Approx. 1,500.0
Bradlees, Braintree, Mass. (The Stop & Shop Companies)	871.6
Brooks Fashion Stores Inc., New York, N.Y.	211.5
Brown Group Inc., St. Louis, Mo.	Specialty retailing: 278.1
Burlington Coat Factory, Burlington, N.J.	130.5
J. Byron's (Jack Eckerd Corp.), Clearwater, Fla.	168.4
Carson Pirie Scott & Co., Chicago, Ill. (Sales of department store division: $323.4 million)	797.6
Carter Hawley Hale Stores, Inc., Los Angeles, Calif. (Department store division sales: $2.0 billion; specialty stores, $1.0 billion; including Contempo Casuals with sales totaling $54 million)	3,054.8
Charming Shoppes, Inc., Bensalem, Pa.	174.3
Danners, Inc. (Three-D), Indianapolis, Ind.	163.2
Dayton Hudson Corp., Minneapolis, Minn. (Includes sales of Mervyn's, Hayward, Calif., $1.3 billion; of the department store division, $1.35 billion; Target Stores, $2.4 billion; specialty stores, $0.6 billion)	5,660.7
Dillard Department Stores, Inc., Little Rock, Ark. (Including three department store divisions: Central Division, Texas-New Mexico Division, Little Rock Division)	711.3
Dollar General Corp., Scottsville, Ky.	290.1
Duckwall-ALCO Stores Inc., Abilene, Kans.	216.3
The Dunlap Co., Fort Worth, Tex.	100.0

MAJOR NATIONAL/REGIONAL CHAINS (continued)

Retail Chain	Sales (Millions of $)
Eddie Bauer, Inc., Redmond, Wash. (General Mills)	$ 80.0
Edison Bros. Stores, Inc., St. Louis, Mo. (Specialty store division sales: $224.4 million)	915.9
Elder Beerman Stores Corp., Dayton, Ohio (Department store division: $200 million)	262.5
Evans Inc., Chicago, Ill. (112 specialty stores and leased departments)	109.8
Family Dollar Stores Inc., Charlotte, N.C.	207.4
Federated Department Stores Inc., Cincinnati, Ohio (Excluding supermarket sales) (Department store division sales: $5.6 billion) (A promotional popular-price soft goods chain is to be opened in 1984)	6,423.2
Frederick's of Hollywood, Hollywood Calif.	41.5
Gap Stores Inc., San Bruno, Calif.	444.9
Gaylords National Corp., Secaucus, N.J.	114.5
Glosser Brothers, Inc., Johnstown, Pa.	223.7
W. R. Grace & Co., New York, N.Y. (Apparel specialty store sales)	134.0
HRT Industries, Los Angeles, Calif. (Filed Chapter 11 in Nov. 1982)	443.6
Hart Schaffner & Marx, Chicago, Ill. (Hartmarx retail stores division)	456.0
Heck's Inc., Charleston, W.Va. (Discount department and shoe stores)	399.3
D.H. Holmes, New Orleans, La. (department stores plus car care centers, shoe stores)	240.7
Howland-Steinbach/Hochschild, Kohn, Woodbridge, N.H. (Supermarkets General)	185.0
Interco Inc., St. Louis, Mo. (General merchandise store division sales, including P.N. Hirsch, St. Louis: $196 million)	685.7
Jacobson Stores Inc., Jackson, Mich.	181.3
Jamesway Corp., Secaucus, N.J.	336.8
K mart Corp., Troy, Mich.	16,772.2
Lamont's Apparel Stores (Pic 'n Save Corp), Los Angeles, Calif.	108.3
M.H. Lamston Inc., New York, N.Y.	44.7
The Limited Stores, Inc., Columbus, Ohio (Including Lane Bryant, New York, N.Y.) with a volume of about $300 million; not including Victoria's Secret, San Francisco, which is expected to reach $15 million in fiscal 1983. Both operations were acquired in 1982)	721.4
Loehmann's, New York, N.Y. (Acquired by Associated Dry Goods in 1983)	260.0
R.H. Macy & Co. Inc., New York, N.Y. (Fiscal year ending January 1983)	3,219.4
Marshall Field & Co., Chicago, Ill. (Acquired Batus Inc., in 1982) Retail Div. incl. Breuners	868.5
May Department Stores, St. Louis, Mo. (Department store division sales: $2,654.6 million).	3,670.4
Melville Corp., Harrison, N.Y. (Apparel specialty stores, including Foxmoor Casuals, Brickton, Mass., $179.2 million; Chess King, Worcester, Mass. men's wear stores, $152.5 million; Marshall's $829.9 million, Wilson's House of Leather & Suede, Los Angeles, $37.4 million)	1,161.6

MAJOR NATIONAL/REGIONAL CHAINS (continued)

Retail Chain	Sales (Millions of $)
Mercantile Stores Co., Wilmington, Del.	$ 1,428.4
Miller-Wohl Co., Secaucus, N.J.	222.4
Montgomery Ward, Chicago, Ill. (Marcor, Inc.) (Sales of Jefferson Ward Stores: $565 million)	6,143.0
G.C. Murphy Co., McKeesport, Pa.	822.3
National Shirt Shops, New York, N.Y.	63.0
New Process Co., Warren, Pa.	235.4
S. E. Nichols Inc., New York, N.Y.	262.0
Nordstrom Inc., Seattle, Wash.	612.9
Oshman's Sporting Goods, Inc., Houston, Tex.	247.3
Paul Harris, Indianapolis, Ind.	90.4
J.C. Penney Co., Inc., New York, N.Y. (Consolidated continuing operations only)	11,414.0
Petrie Stores Corp., Secaucus, N.J.	566.7
Phillips-Van Heusen Corp., New York, N.Y. (Apparel specialty store sales)	101.4
H.C. Prange Co., Sheboygan, Wis. (Including PrangeWay Discount Store sales)	221.8
Rapid American, New York, N.Y. (Including Lerner's $790 million; McCrory and Britts Division)	2,570.7
Rose's Stores Inc., Henderson, N.C.	661.9
Salkin & Linoff Inc., Minneapolis, Minn.	85.0
Schottenstein's Stores Corp., Columbus, Ohio	129.0
SCOA Industries, Inc., Hills Department Stores, Canton, Mass.	900.0
Sears, Roebuck & Co., Inc., Chicago, Ill. (U.S. merchandising operations only)	18,778.8
Sprouse-Reitz Co., Inc., Portland, Ore.	150.5
Sterling Stores Co., Little Rock, Ark. -- 1981 volume:	130.7
Strawbridge & Clothier, Philadelphia, Pa. (Including sales of Clover Stores estimated at $160 million)	472.3
Super Valu Stores Inc., Minneapolis, Minn. (Includes ShopKo Stores, Green Bay, Wis., volume $389.5 million; County Seat, Eden Prairie, Minn., $192 million)	581.5
U.S. Shoe Corp., Cincinnati, Ohio--Apparel specialty retailing division sales:	583.2
Wal-Mart Stores Inc., Bentonville, Ark.	3,376.2
Wickes Companies, Inc., San Diego, Calif. (Including General & Apparel Retailing Sales: $1,508 million)	2,671.5
Winkelman Stores Inc., Detroit, Mich.	99.2
Winn's Stores Inc., San Antonio, Tex.	149.4
F.W. Woolworth Co., New York, N.Y. (U.S. Woolworth, $1,707 million; apparel specialty store division, $272.6 million incl. Richman Bros., Cleveland, which had a volume of $198.0 mil.) (Acquired Holtzman's Little Folk Shop, Calif., which had 1982 volume of about $41 million)	5,124.0
Younkers, Des Moines, Iowa (Equitable of Iowa Companies, Des Moines, Iowa)	166.6
Zayre Corp., Framingham, Mass.	2,139.6

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS

Corporations & Retail Divisions	Location of Headquarter Office or Headquarter Stores
Allied Stores Corporation	New York, N.Y.
Ann Taylor	New York, N.Y.
Block's (William H. Block & Co.)	Indianapolis, Ind.
The Bon (Bon Marche)	Seattle, Wash.
Bonwit Teller	New York, N.Y.
Brooks Bros.	New York, N.Y.
Cain-Sloan	Nashville, Tenn.
Catherine's Stout Shoppe (Plus Size)	Memphis, Tenn.
Deys	Syracuse, N.Y.
Donaldson's	Minneapolis, Mn.
Garfinckel's	Washington, D.C.
Harzfelds	Kansas City, Mo.
Heer's	Springfield, Mo.
Herp's	Muskegon, Mich.
Jordan Marsh-New England	Boston, Mass.
Jordan Marsh-Florida	Miami, Fla.
Joske's	Dallas, San Antonio and Houston, Tex.
Levy's	Savannah, Ga.
Maas Brothers	Tampa, Fla.
Miller & Rhoads	Richmond, Va.
Miller's	Knoxville, Tenn.
Muller's	Lake Charles, La.
Plymouth	New York, N.Y.
Pomeroy's	Harrisburg and Levittown, Pa.
Read's	Bridgeport, Conn.
Stern's/Gertz	Paramus, N.J.
Troutman's (A.E. Troutman Co.)	Greensburg, Pa.
Wren's (Edward Wren Store)	Springfield, Ohio
Almy Stores, Inc.	Brighton, Mass.
Almy's	Brighton, Mass.
Edgar's	Fall River, Mass.
Edwards	Greece and Pittsford, N.Y.
Freese's	Bangor, Maine
Gorin's	Brighton, Mass.
Star Store	New Bedford, Mass.
R.H. White	Worcester, Mass.
Witherill	Camillus, N.Y.

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS

(continued)

Corporations & Retail Divisions	Location of Headquarter Office or Headquarter Store
Associated Dry Goods	New York, N.Y.
L.S. Ayres & Co.	Indianapolis, Ind.
Caldor, Inc.	Norwalk, Conn.
The Denver Dry Goods Co.	Denver, Colo.
The Diamond (Sold in March 1983)	Charleston, W.Va.
Goldwater's	Scottsdale, Ariz.
Hahne & Co.	Newark, N.J.
Joseph Horne Co.	Pittsburgh, Pa.
Lord & Taylor	New York, N.Y.
The H & S Pogue Co.	Cincinnati, Ohio
Powers Dry Goods Co.	Minneapolis, Minn.
J.W. Robinson Co.	Los Angeles, Calif.
Robinson's of Florida	St. Petersburg, Fla.
Sibley, Lindsay & Curr Co.	Rochester, N.Y.
Stewart & Co. (merged with Caldor's in 1982)	Baltimore, Md.
The Stewart Dry Goods Co.	Louisville, Ky.
Stix, Baer & Fuller	St. Louis, Mo.
Sycamore Specialty Stores	Indianapolis, Ind.

(Acquired Loehmann's in 1983.)

Corporations & Retail Divisions	Location of Headquarter Office or Headquarter Store
Batus, Inc. (Batus Retail Group)	New York, N.Y.
The Crescent	Spokane, Wash.
Frederick & Nelson	Seattle, Wash.
Gimbels-East	New York, N.Y.
Gimbels-Midwest	Milwaukee, Wis.
Gimbels-Pittsburgh	Pittsburgh, Pa.
Ivey's-Carolinas	Charlotte, N.C.
Ivey's-Florida	Orlando, Fla.
Kohl's Department Stores	Brookfield, Wis.
Marshall Field & Co.	Chicago, Ill.
Saks Fifth Avenue	New York, N.Y.
Thimbles	Chicago, Ill.
Carter Hawley Hale Stores, Inc.	Los Angeles, Calif.
Bergdorf Goodman Co.	New York, N.Y.
The Broadway-Southern California	Los Angeles, Calif.
The Broadway-Southwest	Phoenix, Ariz.
Contempo Casuals	Los Angeles, Calif.
Emporium Capwell	San Francisco, Calif.
Neiman-Marcus	Dallas, Tex.
Thalhimers	Richmond, Va.
John Wanamaker	Philadelphia, Pa.
Weinstock's	Sacramento, Calif.

(Also operates Holt, Renfrew, headquartered in Montreal, Canada.)

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS
(continued)

Corporations & Retail Divisions	Location of Headquarter Office or Headquarter Store
CML	Acton, Mass.
Britches of Georgetown	Washington, D.C.
Carroll Reed	Boston, Mass.
Golup's	Minneapolis, Minn.
Country Store of Concord	Concord, N.H.
Dayton Hudson Corp.	Minneapolis, Minn.
John A. Brown	Oklahoma City, Okla.
Dayton's	Minneapolis, Minn.
Diamond's	Phoenix, Ariz.
Hudson's (J.L. Hudson Co.)	Detroit, Mich.
Mervyn's	Hayward, Calif.
Plum's (opened in March 1983)	Los Angeles, Calif.
Edison Brothers Stores, Inc.	St. Louis, Mo.
Fashion Conspiracy	San Diego, Calif.
Jeans West/Oak Tree	St. Louis, Mo.
Size 5-7-9 Shops	St. Louis, Mo.
Elder Beerman Stores Corp.	Dayton, Ohio
Elder Beerman Dept. Stores	Dayton, Ohio
Margo's	Dallas, Texas
Spare Change (acquired in April 1982)	Dayton, Ohio
Federated Department Stores, Inc.	Cincinnati, Ohio
Abraham & Straus	Brooklyn, N.Y.
Bloomingdale's	New York, N.Y.
Boston Store	Milwaukee, Wis.
Bullock's	Los Angeles, Calif.
Bullock's Northern California (to be liquidated in 1983)	Palo Alto, Calif.
Burdine's	Miami, Fla.
The Children's Place (acquired March 1982)	Pine Brook, N.J.
Filene's (including basement stores)	Boston, Mass.
Foley's	Houston, Texas
Goldsmith's	Memphis, Tenn.
Lazarus	Columbus, Ohio
I. Magnin	San Francisco, Calif.
Rich's	Atlanta, Ga.
Sanger-Harris	Dallas, Texas
(including Levy's, Tuscon, Ariz. as of April 1982)	Dallas, Texas
Shillito's/Rike's (operation combined in April 1982)	Cincinnati, Ohio

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS

(continued)

Corporations & Retail Divisions	Location of Headquarter Office or Headquarter Store
General Mills, Inc.	Minneapolis, Minn.
Eddie Bauer	Redmond, Wash.
The Talbots, Inc.	Hingham, Mass.
Wild West (acquired in 1982)	Costa Mesa, Calif.
W.R. Grace	New York, N.Y.
Berman's	Brooklyn Park, Minn.
Shepler's	Wichita, Kansas
Hart Schaffner & Marx (Hartmarx Retail)	Chicago, Ill.
Baskin Clothing Co.	Chicago, Ill.
Ray Beers	Topeka, Kansas
Blackburn's	Amarillo, Texas
Capper & Capper, Ltd.	Detroit, Mich. and Chicago, Ill.
Country Miss Stores	New York, N.Y.
deJong's	Evansville, Ind.
Field Brothers	New York, N.Y.
Arthur Frank	Salt Lake City, Utah
Frank Bros.	San Antonio, Texas
Hanny's	Phoenix, Ariz.
Hasting's	San Francisco, Calif.
Jack Henry	Kansas City, Mo.
Heyward-Mahon	Greenville, S.C.
J. O. Jones	Charlotte, N.C.
Kleinhans	Buffalo, N.Y.
Klopfenstein's	Seattle, Wash.
Kuppenheimer's (acquired December 1982)	Atlanta, Ga.
Leopold Price & Rolle	Houston, Texas
Levy-Wolf	Jacksonville, Fla.
Liemandt	Minneapolis, Minn.
Littler's	Seattle, Wash.
Merritt Schafer & Brown	Austin, Texas
National Clothing	St. Louis, Mo.
Polo Shop	Seattle, Wash.
Porter-Stevens	New Orleans, La.
Root's	Red Bank, N.J.
Shulman's	Hampton, Va.
Silverwoods	Los Angeles, Calif., Las Vegas, Nev.
Stevens	Jackson, Miss.
Chas. A. Stevens	Chicago, Ill.
F. R. Tripler & Co.	New York, N.Y.
Walkers	Columbus and Dayton, Ohio
Wallachs	New York, N.Y.
Wallachs of Florida	Miami, Fla.
Jas. K. Wilson	Dallas, Tex.
Wolf Bros.	Tampa, Fla.
Zachry	Atlanta, Ga.

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS
(continued)

Corporations & Retail Divisions	Location of Headquarter Office or Headquarter Store
Interco, Inc.	St. Louis, Mo.
Alberts	Detroit, Mich.
Fine's Men's Shops, Inc.	Norfolk, Va.
Golde's Department Stores	St. Louis, Mo.
P.N. Hirsch & Co. (275 out of 350 units are to be sold to Dollar General Corp.)	St. Louis, Mo.
Standard Sportswear, Inc.	Pittsburgh, Pa.
United Shirt Distributors, Inc.	Detroit, Mich.
Limited Stores Co. (The Limited)	Columbus, Ohio
Lane Bryant (acquired in May 1982)	New York, N.Y.
The Limited/Limited Express	Columbus, Ohio
Roaman's (acquired in November 1982)	New York, N.Y.
Sizes Unlimited (opened January 1983)/ Smart Size	New York, N.Y.
Victoria's Secret (acquired in July 1982)	San Francisco, Calif.
R.H. Macy & Co., Inc.	New York, N.Y.
Bamberger's	Newark, N.J.
Davison's	Atlanta, Ga.
Macy's California	San Francisco, Calif.
Macy's Midwest	Kansas City, Mo.
Macy's New York	New York, N.Y.
Manhattan Industries, Inc.	New York, N.Y.
Brand Name Fashion Outlet	Glen Rock, N.J.
Frost Brothers, Inc.	San Antonio, Tex.
Manhattan Ward, Inc.	Conshohocken, Pa.
The May Department Stores Co.	St. Louis, Mo.
Famous-Barr Co.	St. Louis. Mo.
G. Fox & Co.	Hartford, Conn.
The Hecht Co.	Washington D.C. and Baltimore, Md.
Kaufmann's	Pittsburgh, Pa.
May-Cohens	Jacksonville, Fla.
The May Co.	Cleveland, Ohio
May Co. California	Los Angeles and San Diego, Calif.
May-D & F	Denver, Colo.
Meier & Frank Co.	Portland, Ore.
The M. O'Neil Co.	Akron, Ohio
Stouss	Youngstown, Ohio
Melville Corp.	Harrison, N.Y.
Chess King	Worcester, Mass.
Foxmoor	West Bridgewater, Mass.
Marshall, Inc.	Woburn, Mass.
Wilson's (acquired in April 1982)	Los Angeles, Calif.

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS

(continued)

Corporations & Retail Divisions	Location of Headquarter Office or Headquarter Store
Mercantile Stores Co., Inc.	Wilmington, Del.
Bacon's	Louisville, Ky.
Castner-Knott Co.	Nashville, Tenn.
de Landrecies	Fargo, N.D.
Gayfer's/Montgomery Fair	Montgomery, Ala.
C.J. Gayfer & Co.	Mobile, Ala.
Glass Block	Duluth, Minn.
Hennessey's	Billings, Mont.
The Jones Store Co.	Kansas City, Mo.
Joslin's	Denver, Colo.
Lion	Toledo, Ohio
McAlpin's	Cincinnati, Ohio & Lexington, Ky.
The People's Store	Tacoma, Wash.
Root's (combined with Bacon's in 1982)	Terre Haute, Ind.
J.B. White	Augusta, Ga. & Columbia, S.C.
The Miller-Wohl Co., Inc.	Secaucus, N.J.
Anita's (opened November 1983)	Secaucus, N.J.
Lizzie B	Secaucus, N.J.
Jean Nicole	Secaucus, N.J.
Three Sisters	Secaucus, N.J.
Petrie Stores Corp.	Secaucus, N.J.
David's	Secaucus, N.J.
Franklin's	Secaucus, N.J.
G & G Shops	New York, N.Y.
Hartfield's	Secaucus, N.J.
Marianne	Secaucus, N.J.
Petrie's	Secaucus, N.J.
The Ranch (acquired in July 1982)	Secaucus, N.J.
Stuarts	Secaucus, N.J.
Phillips-Van Heusen Corp.	New York, N.Y.
Hamburger's	Baltimore, Md.
Harris & Frank	Los Angeles, Calif.
Juster's	Minneapolis, Minn.
Kennedy's	Boston, Mass.
Rices Nachmans	Norfolk, Va.
Rapid-American Corp.	New York, N.Y.
Britts Dept. Store Division (closed in 1982)	New York, N.Y.
Lerner Stores Corp.	New York, N.Y.
McCrory Stores Division	New York, N.Y.

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS
(continued)

Corporations & Retail Divisions	Location of Headquarter Office or Headquarter Store
Supermarkets General Corp.	Woodbridge, N.J.
Hochschild, Kohn & Co.	Baltimore, Md.
Howland-Steinbach	White Plains, N.Y. & Asbury Park, N.J.
U.S. Shoe Corp.	Cincinnati, Ohio
Antics/Ups 'N Downs	Enfield, Conn.
August Max	New York, N.Y.
Caren Charles	Enfield, Conn.
Casual Corner	Enfield, Conn.
T. H. Mandy	Merrfield, Va.
The Proving Ground	Enfield, Conn.
J. Riggings	Atlanta, Ga.
United Department Stores, Inc.	Trenton, N.J.
S.P. Dunham & Co.	Trenton, N.J.
The following were closed in 1982:	
Denby Stores	Menands, N.Y.
The Outlet Dept. Stores	Providence, R.I.
Sattler's	Buffalo, N.Y.
Wickes Companies, Inc.	San Diego, Calif.
Gamble Dept. Stores (Sold in 1982)	Chicago, Ill.
Howard Brothers	Monroe, La.
J.M. McDonald (sold in 1982)	Hastings, Neb.
Mode O'Day	Burbank, Calif.
Women's World Shops	La Mesa, Calif.
F. W. Woolworth	New York, N.Y.
Anderson, Little	Fall River, Mass.
J. Brannam	New York, N.Y.
Richman Brothers	Cleveland, Ohio
Susie's Casuals	New York, N.Y.
Woolworth's	New York, N.Y.

FAIRCHILD FACT FILES AVAILABLE FOR 1983

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends. (1982 Edition available now -- 1983 Edition will be available in January, 1984)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and findings in a comprehensive consumer survey conducted by Footwear News Magazine. ($15.00)

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits.

PERSONAL ELECTRONICS: A statistical summary of the market for electronic equipment designed for individuals. Product categories include televisions, radios, stereos, personal stereos, home computers, videosystems and videogames. Data is presented on both the manufacturer and the retailer level. Also includes a section on consumer buying habits. (Special Fact File for 1983, $15.00)

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers, on production and value of shipments of major types of soft surface floor coverings, and foreign trade, are covered in this report. Retailing information includes departmental merchandising and operating results, estimated volume by type of outlet and trends in consumer buying.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and in physical fitness. (Special Fact File for 1982, $15.00)

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery.

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

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Consumer Market Developments

FAIRCHILD FACT FILE

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CONSUMER MARKET DEVELOPMENTS

Current Trends

The unexpectedly strong recovery beginning in March 1983 from the severe recession of 1981-82 was led by the consumer. Spending really spurted in the Christmas season, ending the year on a very strong note for retailers, with depleted stocks ready for refurbishing in 1984.

Consumer spending for all nondurable goods, including apparel and accessories, rose 1% in November 1983 to a seasonally adjusted annual rate of $833.2 billion. The rise in October was 0.9%; in September, 0.5%. Spending for durable goods climbed 1.8% in November to an adjusted annual rate of $295.6 billion, following the 2.5% gain reported for October 1983.

There were some warning signs, however. While the nation's upbeat consumers spent heavily at the close of 1983, their personal income grew more slowly than it had in the previous several months, according to the Department of Commerce. In November, overall consumer spending was up 1.1%. Personal income, however, rose only 0.7% in that month. The gap in the rate of gain in spending versus incomes cannot be sustained, and this is considered by analysts to be an indication that consumer spending, and the economy as a whole, may slow down in coming months.

The GNP grew at an annual rate of 4.5% in the final quarter of 1983, well below the 6% to 7% rate predicted by government and private economists. Deterioration of the nation's trade balance has been cited as the primary reason for the slower-than-expected growth.

With increased employment, there had been expectations that personal incomes would rise at a faster rate; however, employment gains were offset by a decline in the average number of hours worked each week and by a small drop in hourly earnings. Department of Commerce figures for November (which are subject to revision) showed that private wages and salaries grew only 0.2% in November.

Some analysts believe consumption growth will slow down from an 8% rate in the fourth quarter (bringing the total to $2,150 billion in 1983) to 4% for next year as a whole.

Because spending growth outstripped incomes, personal savings in November 1983 fell to a seasonally adjusted annual rate of $118.9 billion, down from $125.7 billion in October. If personal savings continue at the low November rate, many analysts fear that competition for savings funds--the pool needed to finance federal budget deficits as well as business investment--will push up interest rates next year. The consumer spending spurt might also trigger action on the part of the Federal Reserve Board to tighten the money supply, which would also drive up rates.

The trend in interest rates is, of course, a key element in consumer market developments. After two months of declines, housing starts rose 6.4% in November, and the year 1983 is expected to be the best since 1979, with starts totaling 1.7 million units. Some of this spurt in new home constructions can be traced to fears that interest rates will move higher next year.

CONSUMER MARKET DEVELOPMENTS

Current Trends

The strikingly large decline in joblessness, from a high of 10.8% of the civilian labor force to 8.4% by November 1983 has been a key factor in the upbeat mood of consumers. For 1984, however, a further reduction in the unemployment rate will be harder to achieve, as the economy's rate of advance slows down. However, a slowing in the growth of the working age population due to the reduced birth rates of the mid-1960's will help keep the jobless rate at the 8% level or lower by the end of 1984.

Economists generally see a moderate rise in inflation in 1984--in the 5%-to-6% range for the consumer price index as against a rise of less than 4% in 1983. Not all agree, however. Some analysts anticipate a rate of at least 7% in inflation next year. However, in November 1983, consumer prices rose only 0.3% from October and just 3.2% above the November 1982 level. This means that inflation for the year 1983 may be the lowest since 1967 when prices rose 2.9%.

In viewing the outlook for soft goods in 1984, Kurt Salmon Associates looks for the good momentum in the latter part of 1983 to be sustained by the improved economy and by the appeal of new styles and end-uses in apparel. Recently strong categories like jeans, designer labels, and logo insignias may be weaker in 1984, but the slack will be taken up by other items, according to KSA.

In the 12-month period ending September 1983 compared with the same 1982 period, women's wear unit consumption was up an estimated 6%, with activewear looks doing best. Jeans consumption is expected to remain static in 1984, but growth is expected in other pant styles.

On a unit basis, consumption of men's wear is expected to be up 2.5% in 1984, according to KSA estimates, with the casual/activewear influence the prime mover.

Projections on the movement of key economic indicators affecting consumer markets in 1984 have been compiled by Morgan Guaranty Trust Company of New York as follows:

Economic Projections
(Percent change at annual rate from previous quarter,
except where noted)

	1983	1984			
	Q4	Q1	Q2	Q3	Q4
Real Gross National Product	5.5	4.6	4.5	4.6	4.6
Real consumer spending	4.0	4.5	3.4	3.3	2.9
Real business-capital outlays	12.3	9.9	9.2	8.6	9.9
GNP deflator	4.5	4.6	4.3	4.4	4.8
Consumer prices	4.9	4.9	4.7	4.6	4.5
Real disposable personal income	6.0	2.4	2.8	3.2	3.5
Saving rate (%)	5.3	4.8	4.7	4.6	4.8
Housing starts (millions)	1.7	1.7	1.7	1.7	1.7
Auto sales (millions)	9.6	9.9	10.1	10.3	10.4
Unemployment rate (%)	8.5	8.3	8.1	7.9	7.8

Source: The Morgan Guaranty Survey, December 1983.

POPULATION TRENDS

Births

The most recent year for which the National Center for Health Statistics has issued data on annual births by age of mother is 1981, but this shows the trend to an increasing share of the total among older mothers.

Distribution of Births By Age of Mother, 1978-1981

	1981	1980	1979	1978
Total births	100.0%	100.0%	100.0%	100.0%
Age of mother:				
Under 20 years	14.8	15.6	16.0	16.6
20 to 24 years	33.4	33.9	34.0	34.2
25 to 29 years	31.1	30.7	30.6	30.5
30 to 35 years	16.0	15.2	14.8	14.2
35 & older	4.7	4.6	4.6	4.5

Source: U.S. Dept. of Health & Human Services,
National Center for Health Statistics,
Advance Report of Final Natality Statistics
(Vol. 32, No. 9, Dec. 1983).

There are significant differences in birth rates on the basis of race, as noted in a Census Bureau report which showed the rate of births up to June 1982 for women 18 to 34 years of age. Among women of the white race, the rate per 1,000 in the population was 1,024 births; among black women, 1,504; among women of Spanish origin (which could be any race), 1,467.

Live Births in the U.S., Birth Rates & Fertility Rates, 1972-1982

	Number (thous.)				Birth Rate*				Fertility Rate**			
			All Other				All Other				All Other	
Year	All Races	White	Total#	Black	All Races	White	Total#	Black	All Races	White	Total#	Black
1982(p)	3,704.0	na	na	na	16.0	na	na	na	67.8	na	na	na
1981(p)	3,629.2	2,908.7	720.6	587.8	15.8	14.8	22.0	21.6	67.4	63.9	86.4	85.4
1980	3,612.3	2,898.7	713.5	589.6	15.9	14.9	22.5	22.1	68.4	64.7	88.6	88.1
1979	3,494.4	2,808.4	686.0	577.9	15.6	14.5	22.2	22.0	67.2	63.4	88.5	88.3
1978	3,333.3	2,681.1	652.2	551.5	15.0	14.0	21.6	21.3	65.5	61.7	87.0	86.7
1977	3,326.6	2,691.1	635.6	544.2	15.1	14.1	21.6	21.4	66.8	63.2	87.7	88.1
1976	3,167.8	2,567.6	600.2	514.2	14.6	13.6	20.8	20.5	65.0	61.5	85.8	85.8
1975	3,144.2	2,552.0	592.2	511.6	14.6	13.6	21.0	20.7	66.0	62.5	87.7	87.9
1974	3,160.0	2,575.8	584.1	507.2	14.8	13.9	21.2	20.8	67.8	64.3	89.8	89.7
1973	3,137.0	2,551.0	585.9	512.6	14.8	13.8	21.7	21.4	68.8	64.9	93.4	93.6
1972	3,258.4	2,655.5	602.8	531.3	15.6	14.5	22.8	22.5	73.1	68.9	99.5	99.6

na = not available
(p) = provisional
* Live births per 1,000 population
**Live births per 1,000 women 15-44 years of age.
# Includes races not separately reported.

Source: U.S. Dept. of Health & Human Services
National Center for Health Statistics,
Advance Report of Final Natality Statistics
(Vol. 32, No. 9, Dec. 1983)

POPULATION TRENDS

Births

In the 12 months ending June 1982, of the estimated 3,433,000 women 18 to 44 years old who had borne a child, 37% had a first birth, resulting in a first-birth rate of 25.9 per 1,000 women. This is significant for marketers of infants' wear and supplies--a market estimated at some $17 billion in 1982. First-borns account for a disproportionate share of this market, as hand-me-downs account for much of the wardrobes, etc., of subsequent children.

Provisional estimates for the year 1982 place the total number of births in the U.S. that year at 3,704,000, representing a 2% gain over the 1981 total of 3,629,238 and the highest level since the year 1970. The 1982 birth rate was 16.0 live births per 1,000 population compared with 15.8 rate in 1981.

In the first eight months of 1983, estimated births fell 1% below the comparable total for 1982. The January-August 1983 birth rate of 15.6 per 1,000 population fell 2% below the 1982 rate in the same period.

The modest increase in the number of births between 1981 and 1982 reflects the continuing but substantially reduced rate of growth in the number of women of childbearing age and the increase in the rate of childbearing. Overall between 1981 and 1982, the number of women aged 18-44 years increased by 1%. However, within this group, increases were observed only for women aged 25-29 (3%), 35-39 (8%) and 40-44 years (3%). Except for women 25-29 years of age, women in these age groups traditionally have very low rates of childbearing. The number of women aged 15-19, 20-24 and 30-34 declined by less than 1% to 3% between 1981 and 1982. Women in these age groups accounted for nearly two-thirds of all births in 1980.

According to recently issued population projections by the Census Bureau, the number of women of childbearing ages will increase by about 1% annually through 1985. The annual number of births, therefore, should continue to rise, although slightly, unless there are offsetting declines in age-specific birth rates. Between 1985 and 1990, the number of women aged 15-44 years is expected to stabilize with annual increases of less than 1%. Slight declines in this population are anticipated between 1990 and 2000.

The average number of lifetime births expected by women 18 to 24 years old in 1982 was 1,994 per 1,000 women. This rate has remained stable since 1976. If these expectations are realized, their completed fertility will be below the level needed for the natural replacement of their generation (2.1 births per woman).

The women in the U.S. population who are in the prime childbearing years of 18 to 44 represent the baby boom generation, and there are a record number of these women, totaling over 49 million persons, or 41% of the resident female population as of 1982. Within this broad age group, however, there have been significant changes in the percent of women of different age sub-groups who are having children. The sharp increase in the number of younger women entering the labor force and the rising costs of bearing and raising children are factors.

POPULATION TRENDS

Births

While the overall level of fertility did not change significantly between 1980 and 1982, there was some evidence of a decline in the fertility rate for women 18 to 24 years (from 96.6 to 88.3 per 1,000 during this period). This decline was offset by an increase in the fertility rate for women 30 to 34, an increase which began in the mid-1970's and is continuing. This reflects a change toward later childbearing as women who had delayed or postponed childbearing to pursue careers have decided to have families.

Births Per 1,000 Women by Age, June 1980-June 1982

	12-Month Periods, Ending In June			% Change
Age of Women	1982	1981	1980	1980-1982
18 to 44 years	70.5	70.9	71.1	- 0.6%
18 to 24 years	88.3	92.1	96.6	- 8.3
25 to 29 years	110.7	112.8	114.8	- 3.1
30 to 34 years	73.5	67.3	60.0	+ 13.5
35 to 39 years	29.4	28.6	26.9	+ 2.5
40 to 44 years	10.5	7.1	9.9	+ 0.6

Source: U.S. Bureau of the Census, Current Population Reports, Series P-20, No. 379

The monthly pattern in the number of births is quite consistent from year to year, peaking in July/August.

Monthly Pattern in Number of Births, 1981, 1982

	1982	1981
Annual total	100.0%	100.0%
January	8.4	8.3
February	7.6	7.9
March	8.0	8.1
April	7.7	7.6
May	8.2	8.1
June	8.1	8.0
July	9.1	9.0
August	8.7	9.0
September	8.5	8.7
October	8.7	8.8
November	8.1	8.0
December	8.6	8.4

Source: Based on National Center for Health Statistics data.

POPULATION TRENDS

Births

Census Bureau reports show regional variations in fertility rates. A high fertility rate in 1982 was found among women residing in the Mountain Division (90.7 per 1,000 compared with the national average rate of 70.5). Lower rates are found in New England (61.6 per 1,000) and Middle Atlantic (60.6 per 1,000) Divisions. Additionally, a much higher proportion of women in New England are childless (43%) than in the Mountain Division (36%).

Births per 1,000 Women Age 18-44 In Year Ending June 1982
& Percent Childless As Of June 1982

	Women 18-44 Yrs.		Births Per	
	No. (thous.)	%	1,000 Women	% Childless
U.S. total	48,666	100.0	70.5	38.2
New England	2,570	5.3	61.6	43.0
Middle Atlantic	7,603	15.6	60.6	41.9
East North Central	8,886	18.3	73.3	38.0
West North Central	3,498	7.2	70.7	39.2
South Atlantic	7,981	16.4	67.4	36.6
East South Central	3,137	6.4	70.7	31.6
West South Central	5,134	10.5	79.6	33.7
Mountain	2,577	5.3	90.7	36.1
Pacific	7,278	15.0	70.6	41.2

Source: U.S. Bureau of the Census, Current Population Reports, Series P-20, No. 379 (May 1983)

Total Population

As of the 1st of October 1983, the resident population of the U.S. reached a total estimated at 234,359,000, gaining over 2 million persons in a 12-month period. There were 7.8 million more people in the resident population than the total when the complete census was compiled April 1, 1980 (226,546,000).

The total population of the U.S. including Armed Forces overseas numbered 234,875,000 as of October 1983, compared with 227,061,000 as of April 1980.

Estimated Population of the U.S.
(In Thousands)

	Total Including Armed Forces Overseas	Resident Population	Civilian Population
October 1, 1983	234,875	234,359	232,672
October 1, 1982	232,702	232,182	230,522
April 1, 1980 (Census)	227,061	226,546	224,968
April 1, 1970	204,401	203,302	201,131

Source: U.S. Bureau of the Census, Current Population Reports, Series P-25, No. 941 (November 1983)

POPULATION TRENDS

Population By Age & Sex

The population in the younger age groups (5 to 13 years) and school enrollment have reflected the long term decline in births since the middle 1960's. With the rise in the number of births since the middle 1970's, the population under 5 is growing again, so that stabilization and some small growth in the elementary school-age population can be expected soon. Constriction of the population 14 to 17 continues as the last of the baby boom generation passes through high school. That age group has declined by almost 8% since 1980--the largest decline for any age group. The young adult population (18 to 24), which grew enormously in the 1960's and 1970's, has begun to decline since 1981.

The fastest growing age group in the 1970's, ages 25 to 34, increased by 2.2 million or 6% from 1980 to 1982. This group will continue to grow during the 1980's, but at a greatly reduced rate.

In 1982, the oldest cohort of the baby boom entered the 35-to-44 year age group, which has had the largest increase of any age group since 1980 (2.4 million or 9.5%). This is still the most rapidly growing age group and it will continue to be for years to come, as the baby boom generation approaches middle age.

The population in ages 45 to 54 is beginning to decline. The 55-to-64 age group, now growing slowly, will begin to decline in size, reflecting the low birth levels in the 1920's and in the Depression years. By contrast, the elderly population (65 and over) continues to grow rapidly, having increased by 1.3 million or 5.0% since 1980.

The population is aging. In 1982 the median age was 30.6 years, up from 30.0 years in 1980. The median is heading for 36 by the year 2000.

The baby boom generation (1947-1964) remains the most significant factor for marketers. This group is entering their prime consumption years. By 1990, a third of the entire U.S. population will be aged 25 to 44--a middle-aged population component that will have enormous market power and influence. Added to their numbers is the growth in buying power represented by higher incomes and two-earner families.

Distribution of the Resident Population
By Age & By Sex, 1980, 1982

	Number (000) (July 1)		% Distribution		% Change
	1982	1980	1982	1980	1982/1980
Total all ages	231,534	227,202	100.0%	100.0%	+ 1.9%
Under 5 years	17,372	16,457	7.5	7.2	+ 5.5
5 to 9 years	15,956	16,598	6.9	7.3	- 3.9
10 to 14 years	18,024	18,229	7.8	8.0	- 1.1
15 to 24 years	41,508	42,481	17.9	18.7	- 2.3
25 to 34 years	39,301	37,418	17.0	16.5	+ 5.0
35 to 44 years	28,079	25,820	12.1	11.4	+ 8.7
45 to 54 years	22,374	22,730	9.7	10.0	- 1.6
55 to 64 years	22,094	21,756	9.5	9.6	+ 1.5
65 & over	26,824	25,714	11.6	11.3	+ 4.3
Median age	30.6	30.0	--	--	+ 2.0

(continued)

Population by Age & Sex

Distribution of the Resident Population By Age & By Sex, 1980, 1982 (continued)

	Number (000) (July 1)		% Distribution		% Change
	1982	1980	1982	1980	1982/1980
Male population, total	112,498	110,398	100.0%	100.0%	+ 1.9%
Under 5 years	8,886	8,417	7.9	7.6	+ 5.6
5 to 9 years	8,161	8,489	7.2	7.7	- 3.9
10 to 14 years	9,214	9,309	8.2	8.4	- 1.0
15 to 24 years	20,990	21,433	18.7	19.4	- 2.1
25 to 34 years	19,532	18,563	17.4	16.8	+ 5.2
35 to 44 years	13,796	12,667	12.3	11.5	+ 8.9
45 to 54 years	10,820	10,980	9.6	9.9	- 1.4
55 to 64 years	10,321	10,173	9.2	9.2	+ 1.4
65 & over	10,778	10,367	9.6	9.4	+ 4.0
Median age	29.4	28.9	--	--	+ 1.7
Female population, total	119,035	116,804	100.0	100.0	+ 1.9
Under 5 years	8,486	8,039	7.1	6.9	+ 5.6
5 to 9 years	7,796	8,109	6.5	6.9	- 3.9
10 to 14 years	8,811	8,920	7.4	7.6	- 1.2
15 to 24 years	20,518	21,048	17.2	18.0	- 2.5
25 to 34 years	19,769	18,856	16.6	16.1	+ 4.8
35 to 44 years	14,283	13,153	12.0	11.3	+ 8.6
45 to 54 years	11,553	11,750	9.7	10.1	- 1.7
55 to 64 years	11,773	11,582	9.9	9.9	+ 1.6
65 & over	16,046	15,346	13.5	13.1	+ 4.6
Median age	31.9	31.3	--	--	+ 1.9

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-25, No. 929 (May 1983)

Population By Race

Although the same general pattern of population change by age is apparent for Whites and for Blacks, the Black population is growing more rapidly, particularly the segment under 5 years of age. Blacks under 5 years of age accounted for 7.1% of the Black population total in 1982 compared with 6.9% in 1980.

Whites represented 85.5% of the total U.S. resident population in 1982; Blacks, 11.9%; other races, 2.6%. Comparable percentages for 1980 were 85.9%, 11.8% and 2.3%, respectively. The median age for Black and other non-White races in the 1982 resident population was 25.8 years--almost six years younger than the median for Whites.

POPULATION TRENDS

Population By Race

In terms of origin, the fastest growth has been among persons of Spanish derivation. According to the 1980 Census of Population, they increased 61% in number compared with the 1970 Census count. Hispanics of Mexican descent accounted for 60% of the 14,609,000 persons of Spanish origin in the U.S. resident population in 1980; 14% were Puerto Rican, 5% Cuban and 21% of other Spanish origin.

Projections of the U.S. Population

In October 1982 the U.S. Census Bureau issued an advance report covering a new series of projections on the U.S. population by age, race and sex for 1982 to the year 2050, based on July 1, 1981, population estimates. The three series are derived from alternative assumptions on fertility, mortality and net immigration levels. Projections for the year 1985, for example, range from a low of 237,366,000 for the total U.S. population to a high of 240,364,000.

The following table is the "middle" series, reflecting the middle assumptions on future developments in the three factors, and looking to a population totaling 238,648,000 by 1985.

The fastest growing segment of the population in the near future will be the 30-44 year old age group. It will grow to 64 million by 1995 from 47 million in 1980, a 36% increase. The population aged 18 to 21 years, so important to colleges, the military and employers, will decline to 13 million persons by 1995 from 17 million in 1980.

Compared with 1982 counts, the age group 15-to-19 years will decline from 8.5% of the total U.S. population to 6.5% by 1995; the 20-24 group will drop from 9.4% to 6.6% and the 25-34 age group from 17% to 15.6% in the same span of time. Persons age 35-to-44 years, which represented 12.1% of the population in 1982, will account for 16.2% by 1995, according to the middle series of projections; those 45 to 54 will jump from 9.6% to 12.1%. The 55-64 age group will decline from 9.5% in 1982 to 8.0% in 1995, but the 65-and-older group will jump from 11.6% of the total to 13.1% from 1982 to 1995.

Projections of the Resident Population of the U.S.
By Age & Sex, 1985, 1990, 2000
(Middle series projections in thousands)

				% Change	
	1985	1990	2000	1990/1982	2000/1982
Total, all ages	238,648	249,203	267,462	+ 7.6%	+ 15.5%
Under 5 years	18,462	19,200	17,624	+ 10.5	+ 1.4
5-14 years	33,380	35,376	38,276	+ 4.2	+ 12.7
15-19 years	18,405	16,895	18,888	- 14.6	- 4.6
20-24 years	21,282	18,352	16,910	- 15.5	- 22.1
25-34 years	41,781	43,325	36,206	+ 10.2	- 7.9
35-44 years	31,998	37,783	43,655	+ 34.4	+ 55.5
45-54 years	22,461	25,384	37,086	+ 13.4	+ 65.7
55-64 years	22,207	21,089	23,779	- 4.5	+ 7.6
65 years & older	28,673	31,799	35,036	+ 18.5	+ 30.6

(continued)

Projections of the U.S. Population

Projections of the Resident Population of the U.S. By Age & Sex, 1985, 1990, 2000
(Middle series projections in thousands)
(continued)

	1985	1990	2000	% Change 1990/1982	% Change 2000/1982
Male, total	116,124	121,014	129,895	+ 7.6%	+ 15.5%
Under 5 years	9,453	9,831	9,023	+ 10.6	+ 1.5
5-14 years	17,068	18,096	19,590	+ 4.1	+ 12.7
15-19 years	9,390	8,605	9,630	- 14.7	- 4.5
20-24 years	10,800	9,242	8,518	- 15.5	- 21.9
25-34 years	20,900	21,701	18,195	+ 11.1	- 6.8
35-44 years	15,780	18,664	21,772	+ 35.3	+ 57.8
45-54 years	10,882	12,333	18,162	+ 14.0	+ 67.9
55-64 years	10,377	9,889	11,270	- 4.2	+ 9.2
65 years & older	11,473	12,652	13,734	+ 17.4	+ 27.4
Female, total	122,525	128,189	137,566	+ 7.7	+ 15.6
Under 5 years	9,009	9,369	8,600	+ 10.4	+ 1.3
5-14 years	16,311	17,280	18,686	+ 4.0	+ 12.5
15-19 years	9,015	8,290	9,257	- 14.6	- 4.6
20-24 years	10,482	9,111	8,393	- 15.7	- 22.4
25-34 years	20,881	21,624	18,011	+ 9.4	- 8.9
35-44 years	16,218	19,118	21,883	+ 33.8	+ 53.2
45-54 years	13,147	13,051	18,924	+ 13.0	+ 63.8
55-64 years	11,829	11,200	12,509	- 4.9	+ 6.2
65 years & older	17,200	19,146	21,302	+ 19.3	+ 32.8

NOTE: "Middle series" projections reflect the middle assumptions about future levels of fertility, mortality and net migration.

Source: U.S. Bureau of the Census,
Provisional Projections of the Population of States, By Age and Sex: 1980 to 2000
P-25 No. 937 (October 1982)

The changing components of population growth expected in coming years will lead to marked changes in the age and race distribution of the population over the next 70 years. Among the significant developments envisioned in the "middle" projections are the following:

- Overall, U.S. population growth will be slower than in the preceding decade. During the 1970's, the population grew 11%. Projected growth for the 1980's is only 9.7% and growth in the 1990's will be an even slower 7.3%.

- The population of primary-school age (5 to 13 years) would decrease from 30.7 million in 1981 to 29.6 million in 1985, after which it would increase to 34.4 million by 1995.

POPULATION TRENDS

Projections of the U.S. Population

- The population of secondary-school age (14 to 17 years) would decline from 14.9 million in 1981 to 12.9 million in 1990 before increasing to 15.4 million in 2000.

- The population of 18-and-19 year olds, the prime group entering the labor force, college, and the Armed Forces, would decline from 8.5 million in 1981 to 6.5 million in 1995 before rising slowly to 7.5 million in 2000.

- The population of young adults aged 25 to 34 would increase briefly from 39 million in 1981 to 44 million in 1990 before declining to 36 million in 2000.

- Overall, the U.S. population would grow older, with the median age increasing from 30.3 years in 1981 to 36.3 years in 2000 and 41.6 years in 2050.

A special Census Bureau report on the elderly projected that the number of persons aged 65 and over will represent 19% of the total population by 2025 compared with 11% in 1982. No other age group will grow as rapidly over the next 50 years. By 2010, because of the maturation of the baby boom group, 25% of the U.S. population will be at least 55 years old.

Population by Regions & States

Population in the West South Central division of the U.S. showed the largest percentage growth, 5.7%, between 1980 and 1982, well above the U.S. rise of 2.2%. Texas was the biggest gainer in the division with a 7.4% rise to 15.3 million people.

States in the Mountain division rose about as much, up 5.2% over 1980. This division included a 10.0% increase, the highest of any state, in Nevada's population.

The East North Central division was the only one which lost population over the two year span. Other divisions in the Northeast and North Central regions recorded sub-U.S. average increases. Since 1970, the North's share of the U.S. population has declined to 47% from 53%.

Resident Population of States & Regions, 1980, 1982

	Number (000) July 1, 1982	% of U.S. Total	(Number 000) April 1, 1980 (Census)	% of U.S. Total	% Change 1982/1980
U.S. total	231,534	100.0%	226,546	100.0%	+ 2.2%
New England, total	12,493	5.4	12,348	5.4	+ 1.2
Maine	1,133	0.5	1,125	0.5	+ 0.7
New Hampshire	951	0.4	921	0.4	+ 3.3
Vermont	516	0.2	511	0.2	+ 1.1
Massachusetts	5,781	2.5	5,737	2.5	+ 0.8
Rhode Island	958	0.4	947	0.4	+ 1.2
Connecticut	3,153	1.4	3,108	1.4	+ 1.5

(continued)

Population by Regions & States

Resident Population of States & Regions, 1980, 1982
(continued)

	Number (000) July 1, 1982	% of U.S. Total	Number (000) April 1, 1980 (Census)	% of U.S. Total	% Change 1982/1980
Middle Atlantic, total	36,963	16.0%	36,787	16.2%	+ 0.5%
New York	17,659	7.6	17,558	7.7	+ 0.6
New Jersey	7,438	3.2	7,365	3.2	+ 1.0
Pennsylvania	11,865	5.1	11,864	5.2	--
East North Central, total	41,585	18.0	41,682	18.4	- 0.2
Ohio	10,791	4.7	10,798	4.8	- 0.1
Indiana	5,471	2.4	5,490	2.4	- 0.4
Illinois	11,448	4.9	11,427	5.0	+ 0.2
Michigan	9,109	3.9	9,262	4.1	- 1.7
Wisconsin	4,765	2.1	4,706	2.1	+ 1.3
West North Central, total	17,342	7.5	17,183	7.6	+ 0.9
Minnesota	4,133	1.8	4,076	1.8	+ 1.4
Iowa	2,905	1.2	2,914	1.3	- 0.3
Missouri	4,951	2.1	4,917	2.2	+ 0.7
North Dakota	670	0.3	653	0.3	+ 2.6
South Dakota	691	0.3	691	0.3	--
Nebraska	1,586	0.7	1,570	0.7	+ 1.0
Kansas	2,408	1.0	2,364	1.0	+ 1.9
South Atlantic, total	38,213	16.5	36,959	16.3	+ 3.4
Delaware	602	0.3	594	0.3	+ 1.3
Maryland	4,265	1.8	4,217	1.9	+ 1.1
District of Columbia	631	0.3	638	0.3	- 1.1
Virginia	5,491	2.4	5,347	2.4	+ 2.7
West Virginia	1,948	0.8	1,950	0.9	- 0.1
North Carolina	6,019	2.6	5,882	2.6	+ 2.3
South Carolina	3,203	1.4	3,122	1.4	+ 2.6
Georgia	5,639	2.4	5,463	2.4	+ 3.2
Florida	10,416	4.5	9,746	4.3	+ 6.9
East South Central, total	14,812	6.4	14,666	6.5	+ 1.0
Kentucky	3,667	1.6	3,661	1.6	+ 0.2
Tennessee	4,651	2.0	4,591	2.0	+ 1.3
Alabama	3,943	1.7	3,894	1.7	+ 1.3
Mississippi	2,551	1.1	2,521	1.1	+ 1.2
West South Central, total	25,111	10.8	23,747	10.5	+ 5.7
Arkansas	2,291	1.0	2,286	1.0	+ 0.2
Louisiana	4,362	1.9	4,206	1.9	+ 3.7
Oklahoma	3,177	1.4	3,025	1.3	+ 5.0
Texas	15,280	6.6	14,229	6.3	+ 7.4

(continued)

Population by Regions & States

Resident Population of States & Regions, 1980, 1982
(continued)

	Number (000) July 1, 1982	% of U.S. Total	Number (000) April 1, 1980 (Census)	% of U.S. Total	% Change 1982/1980
Mountain, total	11,967	5.2%	11,373	5.0%	+ 5.2%
Montana	801	0.3	787	0.3	+ 1.8
Idaho	965	0.4	944	0.4	+ 2.3
Wyoming	502	0.2	470	0.2	+ 6.8
Colorado	3,045	1.3	2,890	1.3	+ 5.4
New Mexico	1,359	0.6	1,303	0.6	+ 4.3
Arizona	2,860	1.2	2,718	1.2	+ 5.2
Utah	1,554	0.7	1,461	0.6	+ 6.4
Nevada	881	0.4	800	0.3	+ 10.1
Pacific, total	33,049	14.3	31,800	14.0	+ 3.9
Washington	4,245	1.8	4,132	1.8	+ 2.7
Oregon	2,649	1.1	2,633	1.2	+ 0.6
California	24,724	10.7	23,668	10.5	+ 4.5
Alaska	438	0.2	402	0.2	+ 8.9
Hawaii	994	0.4	965	0.4	+ 3.0

Source: U.S. Bureau of the Census,
Current Population Reports
Estimates of the Population of States, by Age
P-25 No. 930.

Twelve states--six of them in the South--contained more than 1 million Blacks in 1980. New York State had the largest Black population (2.4 million), followed by California (1.8 million) and Texas (1.7 million).

Only three states in 1980 had more than 1 million Hispanics. California was home to 4.5 million of them, 30.8% of the country's Hispanic population. Texas had just under 3 million persons of Spanish origin and New York, 1.7 million.

Of the 20 states with the largest percentages of Blacks in their populations, 14 were in the South, led by Mississippi (35.2%) and South Carolina (30.4%). New Mexico's population was 36.6% Hispanic in 1980.

Fully half of the Blacks in the U.S. were concentrated in the South region. The proportion of Blacks in the South dropped to 18.6% of the region's population in 1980 compared with 19.1% in 1970. However, the traditional Black migration from the South appears to be abating. Between 1975 and 1980, about 415,000 Blacks moved to the South but only 220,000 left, according to the Census Bureau.

POPULATION TRENDS

Projected Population by Region & Leading States

Through the rest of the 20th Century, the pattern of regional population growth exhibited during the 1970's is projected to continue, according to the Census Bureau. The West will continue to be the fastest growing region in the country, growing 22.2% from 1980 to 1990 and 18.1% from 1990 to 2000.

The South will maintain its place as the second fastest growing region. However, the South will add more people to its population than any other region, increasing almost 24 million between 1980 and 2000.

Projections of the U.S. Population By Regions, 1980-2000
(Totals in Millions)

	Total Population			% Change	% of Population		
	1980	1990	2000	2000/1980	1980	1990	2000
U.S., total	226.5	249.2	267.5	+ 18.1%	100.0%	100.0%	100.0%
Northeast	49.1	48.4	46.4	- 5.5	21.7	19.4	17.3
New England	12.3	12.7	12.8	+ 4.1	5.4	5.1	4.8
Middle Atlantic	36.8	35.7	33.6	- 8.7	16.2	14.3	12.6
North Central	58.8	60.3	59.7	+ 1.5	26.0	24.2	22.3
East North Central	41.7	42.4	41.6	- 0.2	18.4	17.0	15.6
West North Central	17.2	17.9	18.1	+ 5.2	7.6	7.2	6.8
South	75.3	87.6	98.8	+ 31.2	33.3	35.1	37.0
South Atlantic	36.9	43.1	49.0	+ 32.8	16.3	17.3	18.3
East South Central	14.7	16.1	17.2	+ 17.0	6.5	6.5	6.4
West South Central	23.7	28.3	32.7	+ 38.0	10.5	11.4	12.2
West	43.2	52.9	62.5	+ 44.7	19.1	21.2	23.4
Mountain	11.4	15.4	20.1	+ 76.3	5.0	6.2	7.5
Pacific	31.8	37.5	42.4	+ 33.3	14.0	15.0	15.8

NOTE: These are middle series assumptions which project a middle level of fertility, migration and mortality.

Source: U.S. Bureau of the Census,
Provisional Projections of the Population
of States, by Age & Sex, P-25 No. 937.

Nevada is expected to be the most rapidly growing state in the country, up 59% between 1980 and 1990 and over 50% between 1990 and 2000. As the fastest growing states, Nevada is followed by Wyoming, Arizona and Utah, which are all located in the Mountain region. From 1980 to 1990, Massachusetts, New York, Pennsylvania, Ohio and the District of Columbia are projected to show declines in their populations. In the 1990 to 2000 decade, Rhode Island, Connecticut, New Jersey, Illinois, Michigan, Iowa and South Dakota will join this list.

California will continue to be the largest state, housing over 11% of the U.S. population in the year 2000. If present trends continue through 1990, Texas will surpass New York as the second largest state. By the year 2000, Florida will become the third largest state.

POPULATION TRENDS

Projected Population by Region & Leading States

Population of the 10 Largest States, 1980 & Projections to 1990 & 2000
(Total in Millions)

	1980		1990		2000		
	No.	Rank in U.S.	No.	Rank in U.S.	No.	Rank in U.S.	% Change 2000/1980
California	23.7	1	27.5	1	30.6	1	+ 29.1%
New York	17.6	2	16.5	3	15.0	4	- 14.8
Texas	14.2	3	17.5	2	20.7	2	+ 45.8
Pennsylvania	11.9	4	11.7	5	11.2	5	- 5.9
Illinois	11.4	5	11.5	6	11.2	6	- 1.7
Ohio	10.8	6	10.7	7	10.4	7	- 3.7
Florida	9.7	7	13.3	4	17.4	3	+ 79.4
Michigan	9.3	8	9.4	8	9.2	8	+ 1.1
New Jersey	7.4	9	7.5	9	7.4	9	--
North Carolina	5.9	10	6.5	10	6.9	10	+ 16.9

NOTE: These are middle series assumptions, which project a middle level of fertility, migration and mortality.

Source: U.S. Bureau of the Census, Provisional Projections of the Population of States, by Age & Sex P-25 No. 937

The Conference Board has compiled a broad outline of the demographic and economic developments anticipated in the next decade in the nation's nine major regions, as summarized in the table below. The Sunbelt States and the West are expected to show the greatest growth in population and in total income, with meager growth in the population of the Middle Atlantic States.

Projections of Population & Personal Income by Place

	Population		Personal Income		Per Capita Income	
	Distribution per 1,000 persons 1990	% Change 1980/1990	Distribution per $1,000 1990	% Change 1980/1990	U.S. Average=100 1980	1990
United States, total	1,000.0	9.4%	$1,000.0	46.5%	100	100
New England	54.0	6.2	52.9	39.3	101	99
Middle Atlantic	151.8	0.5	153.5	32.2	104	104
East North Central	181.4	6.3	188.3	41.6	105	105
West North Central	75.7	6.9	73.7	43.2	97	98
South Atlantic	165.2	13.0	158.0	53.9	94	95
East South Central	65.2	11.2	56.4	57.8	81	87
West South Central	107.6	14.5	105.6	57.7	94	95
Mountain	54.1	19.9	53.3	65.8	95	96
Pacific	145.0	14.1	158.3	48.7	112	108

Source: U.S. Department of Commerce; The Conference Board (Across the Board, May 1981).

POPULATION TRENDS

Urban versus Rural Areas

In a reversal of a long-established trend toward urban living, rural areas and small towns grew in population at a faster rate than central cities and suburbs in the 1970's, according to the 1980 Census. This new trend is expected to continue through the 1980's and beyond.

Nearly three-quarters of the U.S. population lived in urban areas in 1980, including 71% of whites, 85% of blacks and almost 90% of persons of Spanish origin. But only 25% of whites living in America's central cities compared with over half of all black persons and almost half of all Hispanics.

Urban & Rural Population of the U.S.
By Race, 1980
(In Thousands)

	All Races	White	Black	Persons of Spanish Origin
Total	226,546	188,372	26,495	14,609
Urban	167,051	134,322	22,595	13,134
Inside urbanized areas	139,171	110,149	20,106	11,552
Central cities	67,035	46,409	15,144	7,134
Urban fringe areas	72,135	63,740	4,962	4,418
Outside urbanized areas	27,880	24,172	2,488	1,581
Rural	59,495	54,050	3,901	1,475

Percent Distribution

	All Races	White	Black	Persons of Spanish Origin
Total	100.0%	100.0%	100.0%	100.0%
Urban	73.7	71.3	85.3	89.9
Inside urbanized areas	61.4	58.5	75.9	79.1
Central cities	29.6	24.6	57.2	48.8
Urban fringe areas	31.8	33.8	18.7	30.2
Outside urbanized areas	12.3	12.8	9.4	10.8
Rural	26.3	28.7	14.7	10.1

Source: U.S. Bureau of the Census,
1980 Census of Population.
U.S. Summary PC80-1-B1.

Mobility

About 17% of the U.S. population changed residences between 1980 and 1981. Most moves were for short distances. Almost 63% were within the same county, 83% were within the same state and 91% were within the same region.

POPULATION TRENDS

Mobility

Among the most frequent movers, about 38% of the 20 to 24 year olds and 31% of the 25 to 29 year olds reported living in a different house one year earlier. Between 1980 and 1981, blacks had a higher overall rate of moving (18%) than whites (16%); however, blacks tended to move shorter distances than whites.

Mobility Status of the Population
March 1980-March 1981

	U.S. Total	Under 14 Years	15-24 Years	25-34 Years	35-54 Years	53 Years & Over
Persons 1 year old & over (in millions)	221.6	47.6	41.2	37.8	48.7	46.4
Residence in 1981 compared with 1980						
Total (percent)	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Living in:						
Same house	82.8	81.0	72.6	73.9	89.0	94.2
Different house in U.S.	16.6	18.4	26.4	25.3	10.5	5.5
Same county	10.4	11.9	16.8	15.7	6.3	3.1
Different county	6.2	6.4	9.6	9.6	4.3	2.3
Same state	3.4	3.4	5.4	5.5	2.3	1.2
Different state	2.8	3.0	4.1	4.1	2.0	1.2
Northeast	0.5	0.4	0.7	0.8	0.3	0.2
North Central	0.7	0.8	1.0	1.0	0.5	0.3
South	1.0	1.1	1.4	1.3	0.7	0.4
West	0.7	0.7	1.1	1.0	0.5	0.2
Movers from abroad	0.6	0.6	1.0	0.8	0.4	0.2

Source: U.S. Bureau of the Census,
Geographical Mobility: March 1980-March 1981
P-20 No. 377

MARRIAGES & MARITAL STATUS

In 1982, 2.5 million couples married, 2% more than in 1981 and the seventh consecutive year the number of marriages has risen. Except for 1974 and 1975, the number increased every year after 1958 and reached a new national record in 1982.

For the first 7 months of 1983, the number of marriages declined 3.1% compared with same 1982 period. The marriage rate for the January-July 1983 period was 10.1 per 1,000 population, 4% below the comparable rate (10.5) in 1982.

For the year 1982, the provisional marriage rate rose to 10.8 per 1,000 population. Except for 1972 and 1973, the rate has not been this high since 1950.

Marriages typically follow a seasonal pattern with a low number in winter and a high number in summer. In 1982, the highest number occurred in June and the lowest was the January total.

MARRIAGES & MARITAL STATIS

Marriages & Marriage Rates in the U.S., 1976-1982

Year	Number	Rate per 1,000 of Total Population
1982(p)	2,495,000	10.8
1981(p)	2,438,000	10.6
1980	2,390,252	10.6
1979	2,331,337	10.4
1978	2,282,272	10.3
1977	2,178,367	9.9
1976	2,154,807	9.9

(p) = provisional.

Source: U.S. Department of Health & Human Services,
National Center for Health Statistics,
Monthly Vital Statistics Report.

Women are now marrying fully 2 years later, on average, than they did in the post-World War II period (22.5 years versus 20.4 years in 1948), as a growing share remain single until after the typical age of college graduation.

Results of the Census Bureau's Current Population Survey in March 1983 indicate that about 39% of women under 40 were single (never married) as were close to half of all men under 40 years of age.

Distribution of Single (Never Married) Population by Age Group
(Noninstitutionalized Population)

	Females			Males		
	1983	1980	1970*	1983	1980	1970*
Total 15 years & older	22.9%	22.5%	22.1%	30.0%	29.6%	28.1%
15 to 19 years	93.4	91.2	90.3	98.1	97.3	97.4
20 to 24 years	55.5	50.2	35.8	73.2	68.8	54.1
25 to 29 years	24.8	20.9	10.5	38.2	33.1	19.1
30 to 34 years	13.0	9.5	6.2	19.6	15.9	9.4
35 to 39 years	7.2	6.2	5.4	10.1	7.8	7.2
40 to 44 years	5.2	4.8	4.9	6.8	7.1	6.3
45 to 54 years	4.5	4.7	4.9	6.0	6.1	7.5
55 to 64 years	4.4	4.5	6.8	4.2	5.3	7.8
65 years & over	5.4	5.9	7.7	4.8	4.9	7.5

* Figures for 1970 include persons age 14.

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-20, No. 382 (July 1983)

MARRIAGES & MARITAL STATUS

Divorce

An estimated 1.18 million couples divorced in 1982, a 3.2% reduction from 1981, the first annual decrease in 20 years. Between 1962 and 1981 the number of divorces had almost tripled. The divorce rate declined in 1982 to 5.1 per 1,000 population compared with 5.3 in 1981. For the first seven months of 1983, the divorce rate was 5.0 per 1,000 population, below the 5.1 rate for the same 1982 period. The actual number of divorces over this 1983 time period was 1.8% below the comparable 1982 time frame.

Starting at 2.2 per 1,000 population in 1962, the divorce rate reached a high of 5.3 for the first time in 1979. The 1970's were the first decade in American history that more marriages ended every year in divorce than in death, and current estimates are that almost half of all marriages that occurred in the early 1970's will end in divorce.

HOUSEHOLDS & FAMILIES

There were 83.9 million households in the U.S. as of March 1983, according to the advance results of the Current Population Survey, only 391,000 more than in 1982. This marks the first time in 20 years that there was no statistically significant increase in the number of households. The number of households headed by 25-34 year olds--the prime group for household formation--declined by 223,000 in 1983.

About 61.3 million households in 1983 are maintained by families (two or more related persons). The large increase over the past 15 years in the number of families maintained by women with no husband present has been one of the most remarkable aspects of recent changes in the composition of families. Since 1970, the number of family households with a female head increased 72%.

Another major trend characterizing changes in household structure in recent years has been the tremendous increase in the number of nonfamily households (householders who either live alone or with others to whom they are not related). About 85% of all nonfamily households in 1983 are persons living alone.

The decline in average household size which began in the mid-1960's, has been interrupted. Average household size increased slightly (although the change was not statistically significant) between 1982 and 1983, a change that is consistent with low household growth.

Recent demographic trends do not account for these changes in household formation patterns. For example, persons roughly 20-35 years of age (baby boomers) are still at the ages where they would be expected to form households at a high rate. Therefore, it appears that the changes observed in 1983 may be a response to a shift in economic conditions and/or to a different social climate. On the four months following the March 1983 survey, household formations did pick up, gaining an estimated 300,000 households in that time, although still depressed from earlier years. According to Chase Econometrics, the number of new household formations, in the 12 months ending March 1984, will approach a record 2 million.

Households & Families by Size & Type
(Numbers in thousands as of March of each year)

	1983		1982	1981	1980		% Change
	Number	%	Number	Number	Number	%	1983/1980
Households, total	83,918	100.0%	83,527	82,368	80,776	100.0%	+ 3.9%
Family households	61,393	73.2	61,019	60,309	59,550	73.7	+ 3.1
Married-couple family	49,908	59.5	49,630	49,294	49,112	60.8	+ 1.6
Male householder, no wife present	2,015	2.4	1,986	1,933	1,733	2.1	+16.3
Female householder, no husband present	9,470	11.3	9,403	9,082	8,705	10.8	+ 8.8
Nonfamily households	22,525	26.8	22,508	22,059	21,226	26.3	+ 6.1
Male householder	9,514	11.3	9,457	9,279	8,801	10.9	+ 8.1
Female householder	13,011	15.5	13,051	12,780	12,419	15.4	+ 4.8
Living alone	19,250	22.9	19,354	18,936	18,296	22.7	+ 5.2
Average size (number)							
All households	2.73		2.72	2.73	2.76		
Families	3.26		3.25	3.27	3.29		

Source: U.S. Bureau of the Census,
Households, Families, Marital Status
and Living Arrangements: March 1983
(Advance Report) P-20 No. 382 (July 1983)

Persons maintaining households in 1982 had a median age of 45.8 years, according to the full report on households and families, released by the Census Bureau in 1983. In general, those maintaining family households were significantly younger (median age 44.5 years) than those maintaining nonfamily households (median age 54.2 years).

Among the 72.8 million White households, 73% were family households; the corresponding proportion among Black households was lower (72%) while among householders of Spanish origin it was higher (83%).

Selected Characteristics of Households by Type: March 1982

	All Households	Family Households	Nonfamily Households
All households, total	83,527	61,019	22,508
Percent	100.0%	100.0%	100.0%
Area of residence:			
Metropolitan areas	68.1	66.6	72.4
Nonmetropolitan areas	31.9	33.4	27.6
Region of residence:			
Northeast	21.5	21.2	22.6
North Central	25.4	25.8	24.6
South	33.4	34.3	30.9
West	19.6	18.7	21.9

(continued)

HOUSEHOLDS & FAMILIES

Selected Characteristics of Households by Type: March 1982
(continued)

	All Households	Family Households	Nonfamily Households
Race & Spanish origin*:			
White	87.2%	87.3%	87.0%
Black	10.7	10.5	11.3
Other race	2.1	2.2	1.7
Spanish origin	4.8	5.4	3.0
Age of householder:			
Under 25 years	7.3	5.9	11.1
25-29 years	11.4	10.9	12.8
30-34 years	11.7	12.8	8.9
35-44 years	18.3	21.4	10.0
45-54 years	15.0	17.6	8.0
55-64 years	15.5	16.0	14.2
65 years & older	20.7	15.4	35.1
Presence of children:			
No own children under 18 years	62.9	49.2	100.0
Some own children:			
Under 18 years	37.2	50.8	na
Under 6 years	16.4	22.4	22.2

na = not applicable
* Persons of Spanish origin may be of any race.

Source: U.S. Bureau of the Census
Household & Family Characteristics: March 1982
P-20 No. 381 (May 1983)

LIVING ARRANGEMENTS

During the 12 year period from 1970 to 1982, the living arrangements of children under 18 shifted significantly. The number of children living with both parents represented 75% of all children, or 46.8 million, compared with 85%, or 58.9 million, in 1970. Children living with one parent numbered 13.7 million in 1982, two-thirds more than in 1970. This increase in the number of children living with one parent is all the more striking in view of the overall 10% decline in the total number of all children under 18 that occurred during the 1970-1982 period.

Among children living with one parent, the mother was the custodial parent in 9 out of 10 cases, and most often the mother is divorced. Children living with their fathers still represented a very small proportion of all children (2%).

In 1982, almost one-half of all Black children under 18 years lived with only one parent. An additional 9% lived with someone other than a parent. For White children the corresponding proportions were: 17% with one parent only, and 2% with someone other than a parent. For children of Spanish origin, 69% lived with both parents and 27% with only one parent, typically a separated or divorced mother.

Living Arrangements of Children Under 18 Years Old, 1982

(Excluded persons under 18 years old who were maintaining households or family groups)

	All Races	White	Black	Spanish Origin
Children under 18 years	62,407	51,086	9,377	5,358
Percent	100.0%	100.0%	100.0%	100.0%
Living with:				
Two parents	75.0	80.8	42.4	69.1
One parent	22.0	17.2	49.2	26.8
Mother only	20.0	15.3	47.2	25.3
Divorced	8.2	8.0	9.6	7.4
Married	5.6	4.3	13.6	10.1
Separated	5.0	3.6	12.7	8.6
Widowed	1.8	1.5	3.3	2.3
Single (never married)	4.4	1.6	20.8	5.4
Father only	1.9	1.9	2.0	1.5
Divorced	1.1	1.1	0.9	0.7
Married	0.4	0.5	0.3	0.4
Separated	0.4	0.4	0.3	0.3
Widowed	0.2	0.2	0.3	0.3
Single (never married)	0.2	0.1	0.5	0.2
Other relatives only	2.5	1.5	7.6	3.4
Nonrelatives only	0.6	0.5	0.8	0.7

Source: U.S. Bureau of the Census
Marital Status & Living Arrangements:
March 1982 P-20 No. 380 (May 1983)

In 1983, there were approximately 1.9 million unmarried couples in the U.S., essentially no change from the previous year but 19.0% more than in 1980. Although the number of such couples has increased three-fold since 1970, they represented only about 4% of all couples (including those who are married) in 1983.

The persons maintaining unmarried-couple households in 1983 were generally younger than in 1970: 8 out of 10 unmarried-couples were maintained by someone under age 45 in 1983 compared with only 3 out of 10 in 1970.

Data for 1982 show that in 40% of the unmarried-couples both partners had never been married.

LIVING ARRANGEMENTS

Selected Characteristics of Unmarried-Couple Households
1970, 1980, 1983
(Numbers in Thousands)

	1983		1980		1970		% Change
	Number	%	Number	%	Number	%	1983/1970
Unmarried-couple households	1,891	100.0%	1,589	100.0%	523	100.0%	+261.6%
Sex of householder:							
Male	1,151	60.9	981	61.7	266	50.9	+332.7
Female	740	39.1	608	38.3	257	49.1	+187.9
Age of householder:							
Under 25 years	455	24.1	411	25.9	55	10.5	+727.3
25-44 years	1,082	57.2	837	52.7	103	19.7	+950.5
45-64 years	233	12.3	221	13.9	187	35.8	+ 24.6
65 years & over	121	6.4	119	7.5	178	34.0	- 32.0
Presence of children:*							
No children under 15 years	1,366	72.2	1,159	72.9	327	62.5	+317.7
Some children under 15 years	525	27.8	431	27.1	196	37.5	+167.9

*For 1970, children in unmarried-couple households are under 14 years old.

Source: U.S. Bureau of the Census,
Households, Families, Marital Status
& Living Arrangements: March 1983 (Advance Report)
P-20 No. 382 (July 1983)

SCHOOL ENROLLMENT

Between 1980 and 1981, total school enrollment continued the downward trend which began in 1975. In October of 1981, 58.4 million persons aged 3 to 34 were enrolled in school, including 2.1 million in nursery school, 3.2 million in kindergarten, 27.8 million in elementary school, 14.6 million in high school and 10.7 million in college.

Compared to the peak year of 1970, the number of elementary school enrolled students is off 18% while high school enrollment is 9% below its mid 1970's peak and kindergarten enrollment was also about 12% below its peak of 1976. College enrollment has increased only slightly since 1970 but the number of children enrolled in nursery school is nearly twice that of 1970.

School Enrollment in the U.S.: 1970, 1975, 1981
(Civilian Noninstitutional Population. Numbers in Thousands)
(Ages 3-34 years)

				% to total enrollment		
	1981	1975	1970	1981	1975	1970
Total enrolled	58,390	60,696	60,357	100.0%	100.0%	100.0%
Nursery School	2,058	1,748	1,096	3.5	2.9	1.8
Public	663	574	333	1.1	0.9	0.5
Private	1,396	1,174	763	2.4	1.9	1.2

(continued)

School Enrollment in the U.S.: 1970, 1975, 1981
(Civilian Noninstitutional Population. Numbers in Thousands)
(Ages 3-34 years)
(continued)

				% to total enrollment		
	1981	1975	1970	1981	1975	1970
Kindergarten	3,161	3,393	3,183	5.4	5.6	5.2
Public	2,616	2,851	2,647	4.5	4.7	4.4
Private	545	542	536	0.9	0.9	0.9
Elementary school	27,795	30,446	33,950	47.6	49.9	56.2
Public	24,758	27,166	30,001	42.4	44.6	49.7
Private	3,037	3,279	3,949	5.2	5.4	6.5
High school	14,642	15,683	14,715	25.1	25.7	24.4
Public	13,523	14,503	13,545	23.2	23.8	22.4
Private	1,119	1,180	1,170	1.9	1.9	1.9
College	10,734	9,697	7,413	18.4	15.9	12.3
Public	8,159	7,704	5,699	14.0	12.6	9.4
Private	2,576	1,994	1,714	4.4	3.3	2.8
Full-time	7,569	7,105	5,763	13.0	11.6	9.5
Part-time	3,166	2,592	1,650	5.4	4.3	2.7
Male	5,372	5,342	4,401	9.2	8.8	7.3
Female	5,363	4,355	3,013	9.2	7.1	5.0

Source: Current Population Reports,
U.S. Bureau of the Census,
Series P-20, No. 273. (February 1983)

The long term decline in school enrollment is a direct result of the aging of the baby boom generation of the 1950's-1960's, as well as the lower birth rate since that time.

The National Center for Education Statistics estimated that the trend towards fewer students will continue until the year 1985. In that year, the center estimates that the number of students will climb through the year 1990 until there are a total 61.7 million students.

The increase in college enrollment between 1970 and 1980 has been primarily due to the increased attendance by women during this period. Female enrollment under age 34 in college during this period rose from 3.0 million to 5.4 million while the increase for males was from 4.4 million to 5.4 million. In 1981 women outnumbered men in college in all age categories except the 20-29 year old span.

SCHOOL ENROLLMENT

College Enrollment by Full-Time Status

(Numbers in Thousands)

	1981		1975		1970	
	Total	% Full-Time	Total	% Full-Time	Total	% Full-Time
Male	5,825	68.6%	5,911	69.3%	na	--
14 to 17 years old	96	90.6	128	89.1	130	97.0%
18 to 19 years old	1,450	90.7	1,426	92.8	1,346	95.3
20 to 21 years old	1,239	87.3	1,256	87.5	1,083	92.6
22 to 24 years old	1,144	73.8	1,011	70.7	902	73.3
25 to 29 years old	909	45.2	1,025	48.2	684	48.4
30 to 34 years old	533	32.3	496	38.8	256	28.5
35 years old & over	453	18.5	569	27.8	na	--
Female	6,303	60.9	4,696	66.1	na	--
14 to 17 years old	136	91.2	164	91.5	130	91.5
18 to 19 years old	1,594	91.4	1,517	92.3	1,248	92.7
20 to 21 years old	1,305	84.5	1,058	85.3	774	86.2
22 to 24 years old	842	59.0	668	54.3	452	51.8
25 to 29 years old	808	38.9	590	41.7	255	31.8
30 to 34 years old	677	24.1	357	30.1	154	18.0
35 years old & over	940	18.9	614	19.2	na	--

na - not available

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P20, No. 374.

EDUCATIONAL ATTAINMENT

The current population of young adults has completed substantially more years of school than members of the older generation. Survey results show that about 86% of persons 25 to 34 years of age in 1981 were high school graduates, but among persons 55 to 64 only 63% had completed high school. The difference was much greater among blacks: 76% of the young adults had completed high school, only 32.5% of the older group.

The proportion of persons 25 years old and over who completed at least one year of college was greater for men than women in both 1970 and 1981. In 1970, about 25% of men as compared with 18% of women had attained this level while in 1981 37% of men and 28% of women had completed one year of college.

In 1970, blacks 25 to 34 years old were much less likely than their white counterparts to have completed at least one year of college; 15% for blacks, compared with 31% for whites. By 1981, the proportionate difference had declined as the figures had increased to 34% for blacks and 46% for whites. In the same age group in 1981 the proportion of blacks who had completed one to three years of college was about the same as whites in 1981 (about 22%), but the proportion who had completed four or more years of college was 12% for blacks compared with 24% for whites.

Years of School Completed by the Population 25 Years Old & Over, By Age, Sex, Race, & Spanish Origin: March 1981 & 1970

(Numbers in Millions)

Age, sex, race, Spanish origin, & region	1981				1970			
		Percent				Percent		
	All Persons	4 Years of High School or More	1 Year of College or More	4 Years of College or More	All Persons	4 Years of High School or More	1 Year of College or More	4 Years of College or More
ALL RACES								
Both sexes, 25 years & over	132.9	69.7%	32.1%	17.1%	109.3	55.2%	21.2%	11.0%
25 to 34 years	37.8	85.6	44.9	23.2	24.9	73.8	29.8	15.8
35 to 44 years	26.2	79.0	37.6	21.5	23.0	64.3	23.8	12.8
45 to 54 years	22.5	69.6	28.8	15.8	23.3	58.2	20.1	10.0
55 to 64 years	21.7	62.6	23.8	12.0	18.4	43.8	17.2	8.7
65 years & over	24.7	41.8	17.3	8.5	19.7	28.3	12.6	6.3
Male, 25 years & over	62.5	70.3	36.7	21.1	51.8	55.0	24.9	14.1
25 to 34 years	18.6	86.1	48.6	26.1	12.2	74.3	34.8	19.7
35 to 44 years	12.8	79.1	42.5	26.2	11.2	63.7	29.0	17.2
45 to 54 years	10.8	68.3	33.8	20.6	11.2	57.0	23.9	13.0
55 to 64 years	10.1	61.8	28.3	16.3	8.7	42.0	18.1	9.9
65 years & over	10.1	40.8	19.1	11.0	8.4	25.9	13.4	7.9
Female, 25 years & over	70.4	69.1	28.1	13.4	57.5	55.4	18.0	8.2
25 to 34 years	19.2	85.2	41.3	20.4	12.6	73.3	25.0	12.0
35 to 44 years	13.4	78.9	32.8	17.0	11.8	64.9	18.9	8.7
45 to 54 years	11.7	70.8	24.1	11.3	12.1	59.4	16.6	7.3
55 to 64 years	11.6	63.2	19.8	8.3	9.7	45.4	16.3	7.6
65 years & over	14.6	42.5	16.1	6.8	11.3	30.1	11.9	5.2
WHITE								
Both sexes, 25 years & over	116.6	71.6	33.1	17.8	98.1	57.4	22.3	11.6
25 to 34 years	32.5	86.9	45.9	24.3	21.9	76.1	31.2	16.6
35 to 44 years	22.7	80.7	38.9	22.5	20.4	66.9	25.0	13.6
45 to 54 years	19.7	72.6	30.0	16.6	21.0	61.2	21.2	10.6
55 to 64 years	19.5	65.8	25.1	12.8	16.7	46.5	18.2	9.1
65 years & over	22.3	44.2	18.4	9.0	18.1	29.9	13.3	6.7
Male, 25 years & over	55.2	72.1	38.0	22.2	46.6	57.2	26.2	15.0
Female, 25 years & over	61.4	71.2	28.0	13.8	51.5	57.6	18.6	8.6
BLACK								
Both sexes, 25 years & over	13.3	52.9	21.2	8.2	10.1	33.7	10.3	4.5
25 to 34 years	4.3	75.9	34.1	11.7	2.7	53.4	15.0	6.1
35 to 44 years	2.8	64.1	23.1	9.1	2.3	41.6	12.2	5.2
45 to 54 years	2.3	44.9	17.2	7.9	2.1	29.1	9.3	3.8
55 to 64 years	1.9	32.5	10.3	4.3	1.5	17.0	6.3	3.8
65 years & over	2.1	17.6	6.5	3.5	1.4	9.0	4.4	2.0
Male, 25 years & over	5.8	53.2	22.1	8.2	4.6	32.4	10.2	4.6
Female, 25 years & over	7.4	52.6	20.5	8.2	5.5	34.8	10.4	4.4

(continued)

EDUCATIONAL ATTAINMENT

Years of School Completed by the Population 25 Years Old & Over, By Age, Sex, Race, & Spanish Origin: March 1981 & 1970

(Numbers in Millions)
(continued)

Age, sex, race, Spanish origin, & region	1981				1970			
		Percent				Percent		
	All Persons	4 Years of High School or More	1 Year of College or More	4 Years of College or More	All Persons	4 Years of High School or More	1 Year of College or More	4 Years of College or More
SPANISH ORIGIN*								
Both sexes, 25 years & over	6.3	44.5%	18.2%	7.7%	3.9	32.1%	11.0%	4.5%
25 to 34 years	2.4	56.9	24.4	8.8	1.3	44.5	14.6	5.4
35 to 44 years	1.5	48.0	18.2	8.2	1.1	33.6	11.7	5.1
45 to 54 years	1.0	38.7	17.6	9.0	1.2	23.8	8.3	3.8
55 to 64 years	0.8	27.3	9.8	5.1				
65 years & over	0.6	17.0	4.8	2.8	0.4	13.4	5.4	2.5
Male, 25 years & over	3.0	45.5	21.0	9.7	1.9	33.4	13.5	5.9
Female, 25 years & over	3.3	43.6	15.8	5.9	2.1	31.0	8.7	3.2

na = not available
*Persons of Spanish origin may be of any race.

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-20, No. 374.

LABOR FORCE, EMPLOYMENT & EARNINGS

Changes in the age composition of the population are reflected in the growing rate of participation in the labor force.

Despite the recession the economy was suffering in that year, the percent of the population which was in the total U.S. labor force (including those in the Armed Forces), rose to 64.3% in 1982 from 64.2% in 1981. However the number of persons employed dropped during this period to 101.2 million due to a decline in employment in the civilian, non-agricultural segment of the economy.

By October 1983, the number of persons holding jobs had risen to 103.6 million according to the Bureau of Labor Statistics. In that same month, the total labor force had also risen, reaching 113.5 million people, representing 64.3% of the population, a figure identical to the 1982 annual average.

Labor Force Profile, 1980 - 1982, October 1982, 1983
(Thousands of persons 16 years of age & over)

	October*		Annual Average		
	1983	1982	1982	1981	1980
Total noninstitutional population, 16 years & older	176,474	174,549	173,939	171,775	169,349
Total labor force**	113,510	112,420	111,872	110,315	108,544
% of population	64.3%	64.4%	64.3%	64.2%	64.1%
Employed, total	103,623	100,844	101,194	102,042	100,907
Resident armed forces	1,695	1,688	1,668	1,645	1,604
Civilian	101,928	99,176	99,526	100,397	99,303
Agricultural	3,202	3,413	3,401	3,368	3,364
Nonagricultural	98,726	95,763	96,125	97,030	95,938
Unemployed, total	9,886	11,576	10,678	8,273	7,637
% of total labor force	8.7%	9.5%	9.5%	7.5%	7.0%

*Seasonally adjusted
**Includes Armed Forces

Source: U.S. Bureau of Labor Statistics, Employment & Earnings, (October 1983)

Between 1977 and 1982, the labor force, including Armed Forces, increased 11.1% reaching 111.9 million people. During the same period domestic employment increased by only 8.1% to 101.2 million workers.

The influx of women into the labor force has had a profound effect on employment in the U.S. Between 1977 and 1982, women increased their share of the labor force from 40.4% to 42.8%. They accounted for 39.9% of total employment in 1977 and 42.9% in 1982. By October 1983, women accounted for 43.0% of labor force and 43.1% of employment.

Employment of the Labor Force, Annual Averages 1977-1982, October 1983
(In Thousands)

	Labor Force			Employment		
Year	Total	Male	Female	Total	Male	Female
1977	100,665	59,959	40,705	93,673	56,291	37,381
1978	103,882	61,151	42,731	97,679	58,010	39,669
1979	106,559	62,215	44,343	100,421	59,096	41,325
1980	108,544	62,932	45,611	100,907	58,665	42,241
1981	110,315	63,486	46,829	102,042	58,909	42,133
1982	111,872	63,979	47,894	101,194	57,800	43,395
October 1983*	113,510	64,690	48,819	103,623	58,912	44,712

*Seasonally adjusted annual rate.

Source: U.S. Bureau of Labor Statistics

LABOR FORCE, EMPLOYMENT & EARNINGS

Although the sharp turnaround in employment is expected to continue into 1984, most analysts believe that many employers are not about to go on a hiring binge. A recent survey by Business Week (12/19/83) indicated that employers are now hiring cautiously in order to preserve productivity gains which were achieved during the recent recession.

Rather than hire more workers, corporations are now relying on overtime to meet the growing demand for their products.

Much of the improvement in the nations job market is directly attributable to the strong growth rate in the services sector of the economy rather than on an overall hiring spree. The unexpectedly low growth rate for the work force, overall, has also contributed to the recent drop in unemployment.

The U.S. Bureau of Labor Statistics had estimated that in 1983 the U.S. labor force would expand by some 1.7 million workers. In reality, there were only one million new entrants into the job market in that year which has led some analysts to warn that unemployment could skyrocket should this missing "army" start to actively seek work.

The aging of the population bodes well for employment overall however. It is almost universally agreed that younger workers (aged 15 to 24) have the most difficulty finding and retaining jobs. In 1980, this group peaked with 42.7 million people; in 1983, it accounted for 39.7 million, although the number of minority youths--who have the most trouble getting jobs--is growing.

Employment Status of the Civilian Noninstitutional Population
By Sex & By Age, October, 1983
(Numbers in Thousands)

	In Civilian Labor Force			Unemployed		Not in Labor Force	
	Number	% of Population In each age group	In Civilian Employment	Number	% of Civilian Labor Force	Number	In school* Number
Men							
16 yrs. & older	62,901	76.0%	57,693	5,208	8.3%	19,900	4,952
16-19	3,982	52.5	3,113	869	21.8	3,603	3,221
20-24	8,459	83.5	7,299	1,161	13.7	1,667	1,221
25-34	18,110	94.1	16,651	1,459	8.1	1,140	409
35-44	13,591	95.4	12,795	796	5.9	657	66
45-54	9,744	91.2	9,229	514	5.3	944	29
55-64	7,125	69.4	6,766	359	5.0	3,143	4
65 & over	1,890	17.8	1,840	50	2.7	8,745	4
Women							
16 yrs. & older	49,140	53.4	44,966	4,174	8.5	42,837	4,743
16-19	3,635	48.2	2,878	757	20.8	3,899	3,170
20-24	7,477	70.3	6,559	918	12.3	3,158	962
25-34	14,078	70.0	12,857	1,221	8.7	6,028	376
35-44	10,488	69.7	9,866	622	5.9	4,567	140
45-54	7,246	63.2	6,849	397	5.5	4,228	51
55-64	4,935	42.0	4,719	216	4.4	6,816	31
65 & older	1,281	8.3	1,237	44	3.4	14,141	14

*Covers only those people who are in school and not in the labor force. Many people in the labor force are, of course, also enrolled in school.

Source: U.S. Bureau of Labor Statistics,
Employment & Earnings, (November, 1983).

During the 1982-1995 period, the Bureau of Labor Statistics estimates that the number of persons of prime working age (25-54) in the labor force, will grow considerably faster than the total labor force. The Bureau also predicts that there will be a decline in the absolute numbers of young workers reflecting the aging of the baby-boomers and the subsequent sharp decline in the birth rate.

In the Bureau's middle projection (out of a series of three), which assumes that labor force participation of women will accelerate and then taper off, the civilian labor force will reach 131.4 million persons by 1995, 3.8 million more than was predicted for that year by estimates made in December 1980. The labor force is expected to grow 1.6% per year between 1982 and 1990, slowing to 1.0% per year during 1990-95, thus continuing the slow growth which began in the late 1970's. Nearly two-thirds of the growth will be among women; nearly one-fourth will be among Blacks and other groups. (Monthly Labor Review, November 1983)

Civilian Labor Force, by Sex, Age & Race, 1982 & Projections to 1995

	Labor Force (in thousands)			Participation Rate		
	1982	1990	1995	1982	1990	1995
Total labor force	110,204	124,951	131,387	64.0	66.9	67.8
Men	62,450	67,701	69,970	76.6	76.5	76.1
16 to 19	4,470	4,123	4,043	56.7	62.3	62.9
20 to 24	8,604	7,151	6,530	84.9	84.4	84.1
25 to 34	17,793	19,569	18,105	94.7	93.7	93.1
35 to 44	12,781	17,469	19,446	95.3	95.6	95.3
45 to 54	9,784	11,142	13,807	91.2	91.2	91.1
55 to 64	7,174	6,419	6,311	70.2	65.5	64.5
65 & over	1,845	1,828	1,728	17.8	14.9	13.3
Women	47,755	57,250	61,417	52.6	58.3	60.3
16 to 19	4,056	3,778	3,761	51.4	56.8	58.2
20 to 24	7,477	7,035	6,796	69.8	78.1	82.0
25 to 34	13,393	16,804	16,300	68.0	78.1	81.7
35 to 44	9,651	14,974	17,427	68.0	78.6	82.8
45 to 54	7,105	8,718	11,125	61.6	67.1	69.5
55 to 64	4,742	4,888	4,671	41.8	41.5	42.5
65 & over	1,185	1,329	1,337	7.9	7.4	7.0

Source: U.S. Bureau of Labor Statistics

LABOR FORCE, EMPLOYMENT & EARNINGS

Unemployment

Unemployment had been decreasing steadily throughout 1983. The unemployment rate, as well as the number of unemployed, registered an unexpectedly large decline in October 1983, falling to 8.7% or 9,886,000 persons. These totals are about half a percentage point below the September level and about 2 points below December 1982's recessionary high. In October 1983, the number of people unemployed was at its lowest level since March of 1982.

The major beneficiaries of the decreasing rate of unemployment have been those industries which were hardest hit by the recent recession--mining, construction and manufacturing. The unemployment rate for workers in mining, which had continued to rise in the early stages of 1983, fell to 11.3% in October, while joblessness among workers in construction and in manufacturing fell to 15.2% and 9.5%, respectively. The latter two rates were at their lowest levels since the early part of the 1981-82 recession.

According to data from the annual work experience survey reported by the Bureau of Labor Statistics, 26.5 million people experienced unemployment at some time during 1982. This total represents 22% of all persons who were in the labor force for all or part of the year and surpasses the previous peak ratio of 20.2% for 1975. It was well above the 1981 rate of 19.5%.

Of the 26 million persons who were unemployed at some time in 1982, 22.5 million did work at least part of the year. However, 4 million did not work at all; the majority of these looked for work only part of the year and then left the labor market.

Unemployment, Annual Averages 1977-1982 & October 1983

	Total Unemployed		(Males (16 & Older)		Females (16 & Older)	
Year	Number (Thous.)	% of Civilian Labor Force	Number (Thous.)	% of Civilian Labor Force	Number (Thous.)	% of Civilian Labor Force
1977	6,991	6.9	3,667	6.1	3,324	8.2
1978	6,202	6.0	3,142	5.1	3,061	7.2
1979	6,137	5.8	3,120	5.0	3,018	6.8
1980	7,637	7.0	4,267	6.8	3,370	7.4
1981	8,273	7.5	4,577	7.2	3,696	7.9
1982	10,678	9.5	6,179	9.7	4,499	9.4
Oct. 1983*	9,886	8.7	5,778	8.9	4,108	8.4

*Seasonally adjusted annual rate. Preliminary figures showed the unemployment rate in 1983 averaged about 9%.

Source: U.S. Bureau of Labor Statistics.

LABOR FORCE, EMPLOYMENT & EARNINGS

Unemployment

There is a considerable variation in the seriousness of the problem of unemployment within the population. Unemployment is highest among young workers, particularly Blacks ages 16-19 where nearly one out of two is jobless. Overall, 22.5% of those workers aged 16-19 did not have a job in the third quarter of 1983. In the third quarter, unemployment for all civilian workers stood at 9.4% while Whites stood at 8.2%; Blacks, 19.5%; and Hispanics at 12.8%.

Unemployment Rates by Sex, Age & Race, 1980-1982,
Seasonally Adjusted Quarterly Averages, 1983
(% of Labor Force Unemployed)

	1983			Annual Averages		
	3rd Qtr.	2nd Qtr.	1st Qtr.	1982	1981	1980
All civilian workers	9.4%	10.1%	10.3%	9.7%	7.6%	7.1%
Men, 20 & over	8.8	9.4	9.7	8.8	6.3	5.9
Women, 20 & over	7.9	8.5	8.9	8.3	6.8	6.4
Both sexes, 16-19	22.5	23.3	22.8	23.2	19.6	17.8
White civilian workers	8.2	8.8	9.1	8.6	6.7	6.3
Men, 20 & over	7.7	8.3	8.5	7.8	5.6	5.3
Women, 20 & over	6.7	7.3	7.7	7.3	5.9	5.6
Both sexes, 16-19	18.0	19.6	18.9	20.4	17.3	15.5
Black civilian workers	19.5	20.7	20.1	18.9	15.6	14.3
Men, 20 & over	18.0	19.8	19.1	17.8	13.5	12.4
Women, 20 & over	16.2	17.0	17.6	15.4	13.4	11.9
Both sexes, 16-19	48.8	47.6	44.4	48.0	41.4	38.5
Hispanic civilian workers	12.8	14.1	15.9	13.8	10.4	9.1

Source: U.S. Bureau of Labor Statistics

During the recent recession, managerial, technical, sales and administrative support personnel did not suffer as badly from unemployment as people in other occupations. However, many occupations which were severely affected by unemployment are now in a healthy stage of recovery.

Unemployment by Occupation & Sex

	Total		Men	Women
	Oct. 1983	Oct. 1982	Oct. 1983	Oct. 1983
Total 16 years & over	8.7%	9.9%	8.3%	8.5%
Managerial & professional specialty	2.7	3.5	2.7	2.6
Executive, administrative & managerial	2.9	3.9	2.8	3.2
Professional specialty	2.4	3.1	2.6	2.3
Technical, sales, & administrative support	5.9	6.6	4.9	6.4
Technicians & related support	4.8	5.4	4.7	5.0
Sales occupations	6.2	6.4	4.3	8.2
Administrative support, incl. clerical	5.9	7.0	6.1	5.8

(continued)

LABOR FORCE, EMPLOYMENT & EARNINGS

Unemployment

Unemployment by Occupation & Sex

	Total		Men	Women
	Oct. 1983	Oct. 1982	Oct. 1983	Oct. 1983
Service occupations	11.1%	10.8%	10.3%	11.6%
Private household	7.8	4.8	na	7.9
Protective service	7.0	7.9	6.6	9.6
All other service	11.9	11.8	11.6	12.1
Precision, production, craft & repair	8.2	10.3	7.9	10.6
Mechanics & repairers	6.7	6.6	6.6	10.0
Construction trades	10.1	14.1	9.9	18.3
Other precision, production, craft & repair	7.4	9.6	6.7	9.9
Operators, fabricators & laborers	12.6	17.1	12.6	12.5
Machine operators, assemblers & inspectors	12.2	18.8	11.9	12.6
Transportation, & material moving occupations	9.5	11.8	9.5	8.5
Handlers, equipment cleaners, helpers & laborers	16.5	18.9	17.0	14.1
Construction laborers	17.9	25.6	17.4	na
Other handlers equipment cleaners, helpers & laborers	16.2	17.7	16.8	13.6
Farming, forestry & fishing	9.2	7.7	8.8	11.4

na = not available

Source: U.S. Bureau of Labor Statistics

Employment by Industry

Between October 1982 and October 1983, employment in goods-producing rather than service producing jobs showed the fastest growth rate. This is a reversal of the trend over the last several years when services have been the main area of growth. Overall, the number of non-agricultural employees has risen 2.4% from October 1982-October 1983 with the goods producing sector up 3.8% and the service producers up 1.9%.

Employees on Nonagricultural Payrolls in Industry Division 1980-1982, October 1982, 1983
(In thousands)

	October(p)			Annual Averages		
	1983	1982	% Change	1982	1981	1980
Total	91,073	88,938	+ 2.4%	89,596	91,156	90,406
Goods-producing, total	24,167	23,287	+ 3.8	23,907	25,497	25,658
Mining	1,038	1,082	- 4.1	1,143	1,139	1,143
Construction	4,089	3,847	+ 6.3	3,911	4,188	4,346
Manufacturing	19,040	18,358	+ 3.7	18,853	20,170	20,285

(continued)

Employment by Industry

Employees on Nonagricultural Payrolls in Industry Division 1980-1982, October 1982, 1983

(In thousands)
(continued)

	October(p)			Annual Averages		
	1983	1982	% Change	1982	1981	1980
Service-producing	66,906	65,651	+ 1.9%	65,689	65,659	64,748
Transportation & public utilities	5,034	5,033	--	5,081	5,165	5,146
Wholesale trade	5,284	5,237	+ 0.9	5,280	5,358	5,275
Retail trade	15,358	15,107	+ 1.7	15,122	15,189	15,035
Finance, insurance, real estate	5,501	5,350	+ 2.8	5,340	5,298	5,160
Services	20,024	19,144	+ 4.6	19,064	18,619	17,890
Government	15,678	15,780	- 0.6	15,083	16,031	16,241
Federal	2,732	2,742	- 0.4	2,739	2,772	2,866
State & local	12,946	13,038	- 0.7	13,064	13,259	13,375

(p) preliminary, seasonally adjusted.

Source: U.S. Bureau of Labor Statistics, Employment & Earnings.

Between October 1982 and October 1983, only two industry groups failed to register gains in employment: government (both federal and state local) and the construction segments. These two segments registered decreases of 0.6% and 4.1%, respectively, during the twelve month period. By contrast, between 1981 and 1982, when the recession was at its peak, seven of the ten measured non-agricultural industries measured recorded declines in the numbers of employees.

Overall, there were 91.1 million persons on non-agricultural payrolls in October 1983, an increase of 2.4%. This compares to a decline of 1.7% in the number of persons employed between 1981 and 1982.

The influx of women into the labor force has changed the complexion of employment immensely since 1977. Females, as a percent of total employees has risen in every measured industry between 1977 and 1982 with the exception of two groups. In the apparel and allied products industry, women as a percent of total fell from 81.7% in 1977 to 80.6% in 1982, while in the leather and leather products group the percent fell from 60.1 to 59.8.

Employment by Industry

Employment By Industry, Annual Averages, 1977-1982

	Employees (thousands)		Females - % of Total Employees	
	1982	1977	1982	1977
Mining	1,143	813	11.9%	8.0%
Construction	3,911	3,851	9.6	7.9
Manufacturing, total	18,853	19,682	31.9	29.9
Durable goods	11,100	11,597	25.6	22.9
Non-durable goods	7,753	8,086	40.9	39.9
Food & kindred products	1,638	1,711	30.3	28.0
Textile mill products	750	910	47.6	46.6
Apparel & other textile products	1,164	1,304	80.6	81.7
Paper & allied products	662	692	23.1	21.8
Printing & publishing	1,269	1,141	40.5	37.1
Chemicals & allied products	1,079	1,074	26.0	22.8
Rubber & misc. plastic products	701	714	34.6	33.2
Leather & leather products	221	255	59.8	60.1
Transportation & public utilities	5,081	4,713	26.3	22.3
Wholesale & retail trade	20,401	18,516	44.3	41.9
Wholesale trade	5,280	4,708	26.4	24.3
Retail trade	15,122	13,808	50.5	47.9
Finance, insurance & real estate	5,340	4,467	59.9	56.2
Services	19,064	15,303	59.4	56.9
Government	15,803	15,127	52.1	45.7

Source: U.S. Bureau of Labor Statistics,
Employment & Earnings,
July, 1983

Full-time & Part-time Workers

The U.S. Bureau of Labor Statistics reports that of the 59 million men 20 years old and over in the civilian labor force in the 3rd quarter of 1983, nearly 95% were considered full-time workers. The comparable figure for women 20 years and older was 80.1% during this same period.

It must be noted that the Department of Labor counts unemployed persons as either full-time or part-time by the kind of employment they are seeking.

Overall, in the third quarter of 1983, almost 86% of the civilian labor force was considered to be full-time employees.

LABOR FORCE, EMPLOYMENT & EARNINGS

Full-time & Part-time Workers

Number & Distribution of Full & Part Time Labor Force, 1983
(Numbers in thousands)

	Number*			Percent		
	3rd Qtr.	2nd Qtr.	1st Qtr.	3rd Qtr.	2nd Qtr.	1st Qtr.
Total civilian labor force	112,268	111,156	110,528	100.0%	100.0%	100.0%
Full-time	96,021	95,539	94,941	85.6	86.0	85.9
Men, 20 & over	55,873	55,547	54,990	49.8	50.0	49.8
Women, 20 & over	36,023	35,674	35,611	32.1	32.1	32.2
Both sexes, 16-19	4,124	4,318	4,340	3.7	3.9	3.9
Part-time	16,199	15,600	15,589	14.4	14.0	14.1
Men, 20 & over	3,128	3,054	3,095	2.8	2.7	2.8
Women, 20 & over	8,936	8,674	8,602	8.0	7.8	7.8
Both sexes, 16-19	4,134	3,872	3,892	3.7	3.5	3.5

*Includes unemployeds allocated by whether seeking full- or part-time work.

Source: U. S. Bureau of Labor Statistics.

Earnings

In 1982, the U.S. Department of Commerce reported that earnings of domestic workers reached $1,826.7 billion, an increase of 4.4% over 1981 and 14.4% above the total registered in 1980. Better than 85% of this total came from wage and salary disbursements in 1982, while proprietors' income accounted for 5.9%.

Earnings By Industry, 1980-1982
(Millions of Dollars)

	Earnings			Percent Change	
	1982	1981	1980	1982/81	1982/80
Total Earnings	$1,826,710	$1,748,818	$1,595,620	+ 4.4%	+14.4%
Farm	33,474	39,825	31,237	-15.9	+ 7.2
Non-farm	1,793,326	1,708,993	1,564,383	+ 4.9	+14.6
Private	1,483,890	1,422,184	1,301,733	+ 4.3	+14.0
Agricultural	7,469	7,137	6,562	+ 4.7	+13.8
Mining	37,301	35,476	28,593	+ 5.1	+30.5
Construction	96,361	97,092	94,633	- 0.8	+ 1.8
Manufacturing	446,316	448,373	412,122	- 0.5	+ 8.3
Nondurable goods	164,501	158,510	145,826	+ 3.8	+12.8
Durable goods	281,815	289,863	266,296	- 2.8	+ 5.8
Transportation & public utilities	144,589	136,243	123,758	+ 6.1	+16.8
Wholesale trade	125,832	119,699	108,900	+ 5.1	+15.5
Retail trade	171,801	164,150	153,067	+ 4.7	+12.2
Finance, insurance & real estate	112,550	101,305	92,627	+11.1	+21.5
Services	341,671	312,709	281,471	+ 9.3	+21.4
Government & government enterprises	309,346	286,809	262,650	+ 7.9	+17.8

Source: U.S. Department of Commerce,
Bureau of Economic Analysis

Earnings

The U.S. Bureau of Labor Statistics reported that in 1982 the average woman earned only 59% of the amount earned by her male counterpart in that year. There are a wide variety of reasons for the disparity in earnings between both men and women including career preferences for traditional, lower-paying "female" occupations, disproportional lower years of education in mathematics, science and engineering among women and outright discrimination against women.

Analysts expect that the gap between men's and women's wages will shrink as time goes on but agree that for the foreseeable future, the gap will not close. Upwardly mobile young women, with a college education and career ambitions, are becoming a powerful force pushing up women's median wages. Wages are also expected to rise as more women enter higher paying occupations. However, it is believed that as women continue to drop out of the labor force to have children or fail to attain proper job skills, the gap will continue to remain open.

A 1982 survey by Market Opinion Research indicates that 46% of adult women think the ideal lifestyle would be to stay at home while their children are young, and to combine jobs with homemaking throughout the rest of their careers.

Median Weekly Earnings of Full-Time Wage & Salary
Workers by Occupation & Sex
(Second Quarter 1983)

	Total	Men	Women
Managerial & professional specialty	$440	$537	$362
Executive, administrative & managerial	459	550	343
Professional specialty	431	524	372
Technical, sales & administrative support	286	392	248
Technicians & related support	367	430	295
Sales occupations	319	394	210
Administrative support, incl. clerical	266	367	249
Service occupations	212	260	180
Private household	120	na	118
Protective service	343	356	240
Service, exc. private household & protective	198	227	183
Precision production, craft & repair	385	398	250
Mechanics & repairers	377	379	349
Construction trades	381	384	na
Other precision production, craft & repair	399	425	236
Operators, fabricators & laborers	275	312	210
Machine operators, assemblers & inspectors	259	329	207
Transportation & material moving occupations	333	336	268
Handlers, equipment cleaners, helpers & laborers	242	248	216
Farming, forestry & fishing	198	203	159

na = not available

Source: U.S. Bureau of Labor Statistics

Earnings

There is a wide difference in earnings between Whites, Blacks and Hispanics. For both males and females, the median wage levels for White workers was significantly higher than for Blacks and those of Spanish origin.

In 1981 the median wage/salary income for males was $15,201, compared with $12,092 in 1978. White males had a median income of $15,797; Blacks attained $10,797 and Spanish-origin males were at the $10,648 level. Females, on the other hand, had a median $7,438 wage/salary income in 1981 compared with $5,358 in 1978. Again Whites had a significantly higher level than other races ($7,418 versus $7,341 for Blacks and $6,744 for Spanish-origin workers).

Size of Wage/Salary Income of Persons 15 Years Old & Over by Race, 1981

	Men				Women			
	Total	White	Black	Spanish Origin	Total	White	Black	Spanish Origin
Total with wage/salary income	60,544	53,518	5,609	3,480	49,646	42,956	5,482	2,452
Percent	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Under $5,000	20.1	19.6	24.6	21.5	37.5	37.7	36.6	38.1
$5,000-$9,999	13.7	12.7	22.0	23.9	25.4	25.0	28.2	31.7
$10,000-$14,999	15.5	15.0	20.3	20.6	20.0	20.2	20.2	19.1
$15,000-$19,999	14.5	14.5	14.4	14.0	10.1	10.2	9.5	6.6
$20,000-$24,999	13.4	13.9	8.9	9.5	4.4	4.4	3.6	3.0
$25,000-$34,999	14.3	15.1	8.3	8.1	2.1	2.2	1.6	1.3
$35,000-$49,999	5.7	6.2	1.2	1.9	0.3	0.3	0.3	0.2
$50,000 & over	2.8	3.0	0.3	0.5	0.1	0.1	--	--
Median income	$15,201	$15,797	$10,648	$10,852	$7,438	$7,418	$7,341	$6,744
Mean income	16,875	17,441	11,744	12,485	8,411	8,431	8,056	7,490
Total with no wage/salary income (thousands)	23,414	19,768	3,004	1,007	42,583	36,635	5,028	2,502

Source: U.S. Bureau of the Census,
Current Population Reports,
P-60, No. 137

Although the unemployment rate is falling much faster than in most previous recoveries, and is already well below the level the Administration and most economists expected, there is little sign of an impending wage explosion as has happened with other recoveries. Evidence of this is that in the third quarter of 1983, unit labor costs rose a scant 1.1%.

As 1984 gets under way, most economists expect that labor costs will continue to increase at only a moderate rate of 5%-5½%. There are several reasons for this, including deregulation, increased foreign competition due to an unusually strong U.S. dollar and long-lasting concessions which were given by unions during the recession.

Earnings

The trend towards multi-earner households, a new development in the 1970's, has continued. The number of households with more than one earner increased from 41.6% of all households in 1980 to 43.9% in 1981.

Obviously, as the number of earners in a household increases total earnings of the household rise dramatically. As this trend towards more earners per household is expected to continue, the median earnings per household is also expected to rise dramatically in the long term.

Number of Earners in U.S. Households, 1981

	Number (Thousands)	Percent of Total	Median Earnings	Mean Earnings
Total households	83,527	100.0%	$20,412	$23,144
Family households	61,019	73.1	22,172	24,916
No earners	8,416	10.1	--	--
One earner	18,445	22.1	13,590	16,768
Two earners	25,396	30.4	24,739	26,768
Three earners	5,841	7.0	31,375	34,040
Four or more earners	2,921	3.5	38,777	41,734
Non-family households	22,508	26.9	13,874	16,380
No earners	8,797	10.5	--	--
One earner	11,212	13.4	12,337	14,277
Two earners	2,244	2.7	22,521	25,152
Three earners	214	0.3	27,246	30,545
Four or more earners	41	--	na	na

Source: U.S. Bureau of the Census
Current Population Reports,
Series P-60, No. 137.

In 1982 median income for 2-earner families (including total money income) and for 3-earner families (which together account for 23% of all families) dropped 2.6% on a constant dollar basis compared with 1981.

Comparison of Median Family Money Income in 1982/1981 by Number of Earners

	1982	1981 Constant $	1981 Current $	% Change In Real Money Income
All families	$23,433	$23,761	$22,388	- 1.4%
Number of earners:*				
Total	23,495	23,808	22,433	- 1.3
No earners	9,911	9,987	9,410	- 0.8
1 earner	18,913	18,707	17,626	+ 1.1
2 earners	28,073	28,507	26,860	- 1.5
3 earners	35,798	36,401	34,298	- 1.7
4 or more earners	44,409	44,563	41,989	- 0.3

Source: U.S. Bureau of the Census, Current Population Reports,
Series P-60, No. 140 (July 1983)

INCOME

Personal

The following table outlines personal income and spending in current dollars, as well as constant dollars (eliminating the effects of inflation), for the years 1981 and 1982, and the annual rate averaged in the first three quarters of 1983.

Personal Income & Its Disposition, 1981-1983
(Billions of Dollars)

	1983*	1982(r)	1981(r)	Percent Change 1983/82	Percent Change 1982/81
Personal income	$2,710.9	$2,578.6	$2,435.0	+ 5.1%	+ 5.9%
Less: Personal tax & nontax payments	404.8	402.1	387.4	+ 0.7	+ 3.8
Equals: Disposable personal income	2,306.1	2,176.5	2,047.6	+ 5.9	+ 6.3
Less: Personal outlays	2,198.1	2,051.1	1,912.4	+ 7.2	+ 7.2
Personal consumption expends.	2,135.5	1,991.9	1,857.2	+ 7.2	+ 7.2
Durable goods**	273.5	244.5	236.1	+11.9	+ 3.6
Nondurable goods	798.5	761.0	733.9	+ 4.9	+ 3.7
Services	1,036.6	986.4	887.1	+ 7.8	+11.2
Interest paid by consumers to business	62.6	58.1	54.3	+ 5.7	+ 7.0
Personal transfer payments to foreigners (net)		1.1	0.9		+22.2
Equals: Personal saving	108.0	125.4	135.3	-13.9	- 7.3
Addenda					
Disposable personal income:					
Total, bils. of 1972 dollars	1,086.8	1,060.2	1,054.7	+ 2.5	- 0.5
Per capita:					
Current dollars	9,854	9,377	8,906	+ 5.1	+ 5.3
1972 dollars	4,640	4,567	4,587	+ 1.6	- 0.4
Population (millions) (av. incl. Armed Forces abroad)	234.0	232.1	229.9	+ 0.8	+ 1.0
Personal saving as a % of disposable personal income	4.7	5.8	6.6	-19.0	- 0.8 pts.
Personal consumption expenditures					
Total, bils. of 1972 dollars	1,005.5	970.2	956.8	+ 3.6	+ 1.4
Durable goods**	154.0	139.8	141.2	+10.1	- 0.1
Nondurable goods	374.5	364.2	362.5	+ 2.8	+ 0.5
Services	479.0	466.2	453.1	+ 2.7	+ 2.9

(r) revised
* annual rate in the first 3 quarters of 1983
**Durable goods is defined as goods which has useful lifetime of three years or more; nondurable goods, less than three years.

Source: U.S. Department of Commerce,
Bureau of Economic Analysis.

INCOME

Personal

A turnaround in the economy began in 1982, triggered in the view of some economists by the sharp declines in interest rates that began in the summer. As the cost of money came down the stock market revived. In turn, this enabled many people to purchase new cars and new homes, and recovery in these key industries sparked an upturn in other sectors, leading to a much improved business and consumer market climate. The rate of recovery gathered momentum in March 1983, sparked by increased consumer spending.

Disposable personal income in 1982 amounted to $2,176.5 billion, up 6.3% compared with 1981. However, on a constant dollar basis, eliminating the effects of inflation, total disposable personal income in 1982 registered a decline of 0.5%.

Compared with the same period in 1982, real per capita disposable personal income in the first quarter of 1983 rose 2.0%; in the second quarter 2.6%; third quarter, 5.6%.

According to the Bureau of Economic Analysis, personal income in October at a seasonally adjusted annual rate rose 1.1% over the September rate; in November, however, there was a slowdown in the gain. The rise in the annual rate for November was only 0.7%, less than expected in view of the increase in non-farm payroll employment in November 1983. This figure is subject to revision.

The Administration's supply-side program has not produced the hoped-for increase in savings. From 6.6% annually in 1981, personal savings as a percent of take-home pay fell to 5.8% in 1982, and sank to 4.0% in the second quarter of 1983--the lowest quarterly rate in 33 years. There was, however, a rise to a 4.7% rate in the third quarter of 1983.

Some shifts in the pattern covering sources of income will be noted in 1983. Based on the first nine months' data, the BEA indicates that because interest rates are down the share of personal income represented by interest income will be lower than the 14.2% reported in 1982; and transfer payments (Social Security, Unemployment and other benefits) will have a larger share--up from 14.2% in 1982.

Distribution of Personal Income by Source, 1981-1983

	1983 Jan.-Sept. Rate	1982	1981(r)
Total personal income	100.0%	100.0%	100.0%
Wage & salary disbursement	60.7	60.8	61.3
Other labor income*	6.3	6.1	5.9
Proprietors' income			
Farm**	0.8	0.8	1.2
Nonfarm**	3.9	3.4	3.7
Rental income	2.0	1.9	1.7
Personal dividend income	2.6	2.6	2.6
Personal interest income	13.3	14.2	14.0
Transfer payments (Social Security, Unemployment & other benefits)	14.8	14.5	13.8

(continued)

INCOME

Personal

Distribution of Personal Income by Source, 1981--1983 (continued)

	1983 Jan.-Sept. Rate	1982	1981(r)
Less: Personal contributions for social insurance	4.4%	4.3%	4.3%

(r) revised

* Employer contributions to private pension, health and welfare funds; workmen's compensation, directors' fees and a few minor items.

**With inventory valuation and capital consumption adjustments.

Source: U.S. Department of Commerce,
Bureau of Economic Analysis.

According to the March 1983 Current Population Survey conducted by the Bureau of the Census, 94% of the males age 15 and over in the U.S. and 86% of the females of the same age had some money income in 1982. As was the case in 1980 and 1981, the median income for men declined while the median income for women increased in 1982; however, median income for males was almost two and half times that for women. Compared with 1981, the median income for men was down 2.4%, while that of women rose 1.6%.

Men and women in the 65-and-over age group showed a significant increase in median incomes compared with 1981 while the medians for other age groups were flat or registered a decline.

According to a recent Census Bureau Report (America In Transition: An Aging Society, P-23, No. 128) Social Security benefits reach 91% of the elderly population. They comprise 50% of the total money income of half of these people.

Total Money Income of Persons 15 Years Old & Over in the U.S. 1979, 1982

	Total		Male		Female	
	1982	1979	1982	1979	1982	1979
Number of persons (thous.)*	178,000	171,861	84,955	83,958	93,145	92,228
Number with income (thous.)	162,227	158,050	79,722	78,129	82,505	79,921
Percent with income:	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Under $6,000	37.4	43.9	23.3	27.4	50.8	60.3
$ 6,000-$9,999	15.5	17.3	13.3	15.5	17.5	19.1
$10,000-$14,999	15.6	15.2	16.0	15.8	15.1	12.7
$15,000-$24,999	18.1	16.0	23.6	25.5	12.6	6.7
Median income (dollars)	$ 9,143	$ 7,254	$13,950	$11,779	$ 5,887	$4,352
Mean income (dollars)	$12,709	$10,121	$17,381	$14,311	$ 8,195	$6,026
Year-round, full-time workers:						
% of civilian income recipients	39.6%	41.1%	50.9%	55.0%	28.9%	27.8%
Median income (dollars)	$17,927	$14,544	$21,655	$17,479	$13,663	$10,531
Mean income (dollars)	$21,209	$17,021	$24,809	$19,935	$15,142	$11,448

*Excludes inmates of institutions.

Source: U.S. Bureau of the Census, Current Population Reports, Consumer Income Series P-60, No. 140 (September 1983).

INCOME

Personal

Selected Characteristics of Persons 15 Years Old & Over With Money Income, 1982 By Sex

	Male				Female			
	No. With Income (thous.)	Median Income	% Change, Median Income 1982/81 Current $	1982 $	No. With Income (thous.)	Median Income	% Change, Median Income 1982/81 Current $	1982 $
Total number, U.S.	79,722	$13,950	+ 3.5	- 2.4	82,505	$ 5,887	+ 7.9	+ 1.6
By race:								
White	70,477	14,748	+ 3.2	- 2.8	71,624	5,967	+ 8.1	+ 1.9
Black	7,290	8,838	+ 4.0	- 2.0	8,921	5,263	+ 7.3	+ 1.1
Spanish origin (any race)	4,092	10,471	+ 2.6	- 3.3	3,832	5,140	+ 1.6	- 4.3
By region:								
Northeast	17,016	14,544	+ 4.2	- 1.9	18,314	5,975	+ 8.6	+ 2.3
North Central	20,522	14,590	+ 2.8	- 3.1	21,202	5,612	+ 6.7	+ 0.5
South	26,422	18,820	+ 5.0	- 1.0	27,165	5,678	+ 8.8	+ 2.5
West	15,761	14,619	+ 0.1	- 5.7	15,825	6,605	+10.6	+ 4.2
Relationship to family								
Householder (Head):								
In families	67,372	14,205	+ 2.7	- 3.3	67,037	5,283	+ 7.8	+ 1.6
Householder	49,318	18,090	+ 3.2	- 2.8	11,233	7,878	+ 5.3	- 0.7
Husband/wife of householder	2,092	14,838	+ 0.5	- 5.3	42,216	5,539	+ 9.9	+ 3.6
Other relative	15,962	3,954	+ 0.9	- 4.9	13,588	3,298	+ 2.6	- 3.3
In unrelated subfamilies	120	7,363	+ 9.0	+ 2.7	391	6,659	+23.2	+16.1
Unrelated individuals*	12,229	12,806	+ 6.0	- 0.1	15,077	8,250	+ 8.9	+ 2.6
Age:								
15 to 19 years	6,348	1,786	- 1.7	- 7.3	5,970	1,697	- 0.9	- 6.7
20 to 24 years	9,648	7,743	- 2.2	- 7.8	9,571	5,506	+ 1.4	- 4.4
25 to 34 years	18,833	16,416	+ 2.0	- 3.9	17,973	7,972	+ 4.9	- 1.1
35 to 44 years	13,852	21,649	+ 2.5	- 3.4	13,291	7,851	+ 6.6	+ 0.4
45 to 54 years	10,501	21,543	+ 2.5	- 3.4	10,169	7,502	+ 6.7	+ 0.5
55 to 64 years	10,096	17,828	+ 2.7	- 3.3	10,543	5,907	+ 9.9	+ 3.5
65 years & over	10,443	9,188	+ 12.4	+ 5.9	14,989	5,365	+12.8	+ 6.3
Total with earnings	64,730	Med. Earnings 15,373	+ 2.1**	- 3.8**	51,820	7,686	+ 6.4	+ 0.3
Occupation group:								
Exec., admin., mgrl.	7,616	26,119	+ 13.3	+ 6.8	3,783	14,592	+17.0	+10.2
Prof. specialty	7,113	24,784	+ 6.4	+ 0.2	6,854	13,696	+12.5	+ 6.0
Tech./related support	1,718	19,735	- 2.5	- 8.1	1,571	12,035	+ 3.9	- 2.1
Sales	6,662	16,943	- 7.0	-12.4	6,726	4,776	+11.6	+ 5.1
Admin. support, clerical	3,741	15,252	+ 8.5	+ 2.2	14,798	9,897	+ 8.2	+ 1.9
Precision prod., craft	12,983	16,629	+ 1.7	- 4.2	1,034	9,300	+10.4	+ 4.0
Mach. oper., assemblers, inspectors	5,257	14,267	- 0.5	- 6.2	4,239	7,763	+ 2.4	- 3.5
Transp., material moving	4,539	14,318	+ 0.8	- 5.1	403	6,305	+ 5.4	- 0.7
Handlers, clnrs., laborers	4,484	6,862	- 5.0	-10.5	882	5,952	- 9.5	-14.7
Service workers	6,738	6,524	+ 3.8	- 2.2	10,832	3,424	+ 8.1	+ 1.8
Farming, fishing, etc.	3,879	3,682	+ 8.7	+ 2.4	697	1,796	+17.0	+10.2

* Unrelated individuals are persons 15 years old and over not living with any relatives, and may be in a one-person household, living with unrelated individuals or in group quarters.

**Comparisons between 1982 and 1981 should be used with caution due to a change in occupational classifications in 1982.

Source: U.S. Bureau of the Census, Current Population Reports, Consumer Income, Series P-60, No. 140 (September 1983).

INCOME

Personal

In 1982 per capita disposable income ranged from $13,312 in Alaska and $11,604 in Connecticut to less than $7,000 in Mississippi. The U.S. average was $9,375, gaining 5.4% over the 1981 average of $8,897.

In the 1959-1982 period, the fastest growth in per capita disposable income on a regional basis was reported for the Southeast, which had an annual growth rate of 7.84%, compared with the national average of 7.19%. In terms of total disposable income, the fastest growth in the 1959-1982 period was reported for the Southwest, which registered an average growth rate of 10.12%, sparked by an 11.22% growth rate in Arizona. An even sharper annual rate of growth on a state basis was reported for booming Florida--averaging 11.28%.

According to an analysis by Business Week (November 28, 1983) in the first seven months of 1983 total personal income in the U.S. was up 5.4%, reflecting the economic recovery. Disposable income, too, was helped by the tax cut in July and by the lower inflation rate.

Income growth in 1983, according to this analysis, on a regional basis was up the sharpest in the South Atlantic Region (+8.4%). Florida, Georgia and North Carolina, which account for more than half of this region's total income, are among the top states in income growth in 1983. Florida's prosperity has been sparked by tourism and a resurgent housing market; North Carolina's new high-tech industries are benefiting from the upturn in business equipment spending.

In 1979-1981 the average annual rate of growth of personal income in metropolitan (metro) areas exceeded that in nonmetropolitan (nonmetro) areas, 11.5% compared with 10.3%. This was in contrast to the pattern in the 1970's. Estimates are not yet available for 1982, but in view of the weakness in farming, mining and lumber, industries which are generally concentrated in nonmetro areas, it is likely that faster metro growth in income continued in that year, according to the Bureau of Economic Analysis.

(It should be noted that BEA and Census Bureau data on income differ due to the fact that the former measures personal income which includes nonmoney income, such as payments in kind, the rental value of owner-occupied housing and noncash benefits such as food stamps; the Census Bureau measures money income, which is the sum of earnings, Social Security, public assistance payments, dividends, interest, rent and other money income.)

INCOME

Personal

The top 15 Metropolitan Areas ranked by 1981 per capita income, as reported by the BEA were as follows:

	1981	1980	% Increase
Midland, TX	$16,467	$13,921	18.3
Bridgeport-Stamford-Norwalk-Danbury, CT	15,697	13,965	12.4
Anchorage, AK	15,563	14,134	10.1
Casper, WY	14,979	13,882	7.9
San Francisco-Oakland, CA	14,416	12,969	11.2
Washington, DC-MD-VA	14,177	12,900	9.9
Nassau-Suffolk, NY	13,676	12,249	11.6
San Jose, CA	13,529	12,265	10.3
West Palm Beach-Boca Raton, FL	13,337	11,947	11.6
Houston, TX	13,303	11,798	12.8
Lafayette, LA	13,284	10,972	21.1
Reno, NV	13,255	10,311	7.7
Anaheim-Santa Ana-Garden Grove, CA	13,027	11,808	10.3
Newark, NJ	13,001	11,702	11.1
Seattle-Everett, WA	12,841	11,787	8.9

Total & Per Capita Disposable Personal Income By States & Regions, 1979, 1982
(Including Income From All Sources Less Personal Tax
Payments & Specified Non-Tax Payments*)

	Total (Mil. of $) 1982	1979	Av. Annual Growth 1959-1982	Per Capita 1982	1979	Av. Annual Growth 1959-1982
United States	2,170,556	1,643,846	8.46%	$ 9,375	$ 7,320	7.19%
New England	125,532	93,111	7.96	10,048	7,542	7.12
Conn.	36,590	11,594	8.10	11,604	8,687	7.06
Maine	8,869	6,812	7.84	7,825	6,055	7.05
Mass.	58,330	43,188	7.71	10,090	7,516	7.14
New Hamp.	8,790	6,396	9.44	9,245	7,014	7.24
Rhode Island	8,761	6,699	7.63	9,140	7,003	7.11
Vermont	4,192	3,086	8.71	8,122	6,102	7.35
Mideast	428,242	325,227	7.47	10,085	7,678	6.98
Dela.	5,692	4,408	8.00	9,452	7,361	6.55
Dist. of Columbia	7,623	5,821	6.59	12,075	8,878	7.45
Maryland	42,704	32,238	8.92	10,012	7,633	7.37
New Jersey	82,362	61,216	8.07	11,073	8,303	7.08
New York	179,611	135,603	7.05	10,171	7,690	6.79
Pennsylvania	110,250	85,942	7.34	9,292	7,238	7.09
Great Lakes	387,129	318,672	7.49	9,309	7,658	6.81
Ill.	116,755	94,316	7.39	10,198	8,257	6.75
Ind.	46,320	39,052	7.61	8,467	7,133	6.81
Mich.	83,934	71,681	7.59	9,214	7,750	6.85
Ohio	96,992	79,654	7.28	8,988	7,376	6.77
Wisconsin	43,129	33,969	7.99	9,050	7,280	7.04

(continued)

INCOME

Personal

Total & Per Capita Disposable Personal Income By States & Regions, 1979, 1982
(Including Income From All Sources Less Personal Tax
Payments & Specified Non-Tax Payments*)
(continued)

	Total (Mil. of $)		Av. Annual Growth	Per Capita		Av. Annual Growth
	1982	1979	1959-1982	1982	1979	1959-1982
Plains	158,390	124,928	8.02%	$ 9,133	$ 7,307	7.40%
Iowa	26,540	21,770	7.71	9,136	7,464	7.42
Kansas	23,906	18,588	8.11	9,929	7,919	7.60
Minn.	38,466	29,835	8.46	9,307	7,388	7.50
Mo.	42,624	33,977	7.66	8,610	6,949	6.96
Neb.	14,576	11,535	8.03	9,193	7,374	7.44
No. Dak.	6,327	4,607	8.76	9,443	7,065	8.38
So. Dak.	5,952	4,615	8.43	8,619	6,698	8.27
Southeast	443,525	327,997	9.50	8,186	6,310	7.84
Ala.	28,930	22,544	8.64	7,338	5,826	7.67
Ark.	16,860	13,361	9.24	7,358	5,888	7.99
Fla.	98,250	66,748	11.28	9,433	7,048	7.60
Ga.	45,490	33,499	9.50	8,067	6,214	7.72
Ky.	28,005	22,499	8.60	7,637	6,102	7.66
La.	38,105	26,401	9.51	8,735	6,378	8.06
Miss.	17,003	13,232	8.91	6,666	5,276	8.08
No. Car.	46,335	35,281	9.14	7,699	6,081	7.72
So. Car.	23,060	17,498	9.45	7,200	5,668	7.98
Tenn.	35,842	27,743	8.98	7,707	6,120	7.67
Va.	51,045	37,719	9.42	9,296	7,084	7.86
West Va.	14,599	11,740	7.78	7,496	6,054	7.56
Southeast	213,502	147,840	10.12	9,415	7,116	7.80
Ariz.	24,899	18,153	11.22	8,705	6,880	7.33
New Mex.	10,817	8,016	8.95	7,958	6,260	7.12
Okla.	30,476	20,684	9.63	9,593	6,964	8.07
Texas	147,311	100,987	10.17	9,641	7,272	7.87
Rocky Mountain	62,644	44,881	9.58	9,124	6,970	7.29
Colo.	31,536	21,535	10.31	10,358	7,558	7.57
Idaho	7,468	5,939	8.79	7,736	6,368	6.98
Montana	6,616	5,161	7.87	8,261	6,540	7.03
Utah	11,805	8,536	9.46	7,599	6,028	6.74
Wyoming	5,218	3,710	9.66	10,402	8,211	7.53
Far West	335,829	250,100	9.06	10,334	8,170	6.86
Calif.	261,996	193,140	9.02	10,597	8,305	6.82
Nevada	8,919	6,274	12.10	10,126	8,199	6.63
Oregon	22,874	18,558	8.79	8,636	7,198	6.83
Wash.	42,040	32,130	9.00	9,903	8,007	7.08
Alaska	5,828	3,686	--	13,312	9,136	--
Hawaii	9,936	7,402	--	9,999	7,791	--

*Non-tax payments include passport fees, fines and penalties, donations, tuition and fees paid to government operated schools and hospitals.

Source: U.S. Bureau of Economic Analysis,
Survey of Current Business (August 1983)

INCOME

Personal

Regional differences in per capita personal income are narrowing, according to the BEA. Regions that had relatively low incomes are rising toward the U.S. average, while those that had high incomes are falling toward it.

Per capita personal income in the Southeast in 1929 was less than 55% of the U.S. average; by 1982 it was 86% of the U.S. average. On the other hand, per capita personal income in the Mideast had dropped from 139% of the U.S. average in 1929 to 105% in 1982.

Wealthy Individuals

According to the Internal Revenue Service, preliminary estimates of the personal wealth of individuals in 1981 showed that there were approximately 4.5 million people in the U.S. with gross assets of $300,000 or more. These "wealthy individuals", who comprised only 2.0% of the nation's population, had net worth (total assests less liabilities) of nearly $2.4 trillion. In contrast, during 1976 fewer than 2 million had a comparable level of gross assets.

An estimated 350,000 to 500,000 individuals were reported to have a net worth of $1 million or more in 1981, up from 180,000 in 1976. Much of the increase in number may be due to inflation and to the rapid increase in the value of real estate.

Of the 4.5 million top wealth holders in 1981 (assets of $300,000 or more) 65% were men; however, the average net worth of female top wealth holders was considerably higher--$637,000 vs. $471,000 for the men.

Profile of the Top Wealth Holders, 1981
(Numbers of people in thousands; money amounts in millions of $)

	Men		Women	
	Number	Assets	Number	Assets
Total	2,950.5	$1,707,993	1,571.2	$1,095,806
Age *				
Under 50	1,417.8	679,001	451.9	274,053
50 - 65	968.2	604,199	640.7	461,153
65 & over	517.2	403,644	438.7	336,932
Assets greater than $500,000	1,237.7	1,216.9	600.9	737.6
By type of asset:	100.0%	100.0%	100.0%	100.0%
Cash	98.4	7.4	93.1	10.5
Corporate stock	82.6	25.4	75.7	23.6
Bonds	35.9	4.9	48.6	7.8
Life insur. equity	91.4	1.8	46.8	0.2
Notes & mortgages	51.6	4.5	39.6	2.6
Real estate	94.2	32.6	79.3	26.5
Noncorporate bus.	49.4	7.0	36.0	4.9
Other assets	97.4	16.3	95.7	23.7

* Age unknown note separately reported.

Source: Dept. of Treasury, Internal Revenue
Service, SOI Bulletin, Summer 1983

INCOME

Household

According to The Conference Board, average household income in 1981 amounted to $22,650 for the U.S. as a whole, but was higher in the Pacific States.

Households & Average Income by Census Division
(Households as of 1982; incomes for 1981)

	Number of Households (Thousands)	Average Household Income
Total	83,528	$ 22,650
New England	4,627	23,780
Middle Atlantic	13,374	22,849
East North Central	14,843	23,229
West North Central	6,411	21,426
South Atlantic	13,958	21,575
East South Central	5,128	18,901
West South Central	8,839	22,696
Mountain	4,205	23,580
Pacific	12,142	24,410

Source: The Conference Board

The Census Bureau has released data on the number and percentage of households by before- and after-tax income in 1980.

Distribution of Households By Before- & After-Tax Income, 1980

	Before Taxes		After Taxes	
	Number (000)	Percent	Number (000)	Percent
Total	82,368	100.0%	82,368	100.0%
Income:				
Under $15,000	34,935	42.4	42,602	51.7
$15,000-$19,999	10,964	13.3	14,415	17.5
$20,000-$24,999	10,017	12.2	10,565	12.8
$25,000-$34,999	13,588	16.4	10,106	12.2
$35,000-$44,999	6,706	8.2	3,124	3.8
$45,000-$59,999	3,887	4.7	1,176	1.4
$60,000-$74,999	1,222	1.5	301	0.4
$75,000 & over	1,051	1.3	80	0.1
Median income	$17,710		$14,551	
Mean income (average)	21,063		16,272	
Income per household member	7,720		5,964	

Source: Bureau of the Census, Current Population Reports, Special Studies Series P-23, No. 126 (August 1983)

INCOME

Household

Before taxes, the highest 20% of the U.S. households based on income had a 44.2% share of aggregate income; after taxes, a 40.6% share.

Percent of Aggregate Income Received By Each Fifth of Households
Before & After Taxes, 1980

	Before Taxes	After Taxes
Total household income	100.0%	100.0%
Lowest fifth	4.1	4.9
Second fifth	10.2	11.6
Third fifth	16.8	17.9
Fourth fifth	24.8	25.1
Highest fifth	44.2	40.6
Top 5%	16.5	14.1
Aggregate income (billions)	$1,734.9	$1,340.3

Source: Bureau of the Census, Current Population Reports, Series P-23, No. 126

During the 1970's the nation's household population grew at a rate of less than 1% a year, but real disposable income grew by better than 3%. The number of households with annual earnings of $35,000 or more (measured in constant 1982 dollars) rose some two and a half times faster than the nation's total household count.

During the 1980's the number of households in the upper brackets will grow even faster, as the baby boom generation reaches the age of peak earning power. By contrast, in the preceding 10 years the young adult population just entering the labor force and relatively low incomes was growing the fastest.

The Consumer Research Center of The Conference Board and the U.S. Bureau of the Census have issued a report on a joint study of the discretionary income market--households where spendable income exceeded the average spendable income of "similar" households by 30% or more. The amount by which it exceeded that level was defined as discretionary income. "Similar" households were considered to be units of identical size, of about the same age, and located in the same type of communities. According to this definition, slightly over 25 million households (21% of the total) had some discretionary income in 1980. Total discretionary income was $193 billion --representing about 14% of the total after-tax income of the nation's households and 28% of the total for households with at least some discretionary income.

INCOME

Household

Total Households & Households With Discretionary Income, 1980
By Age of Head

				Households With Discretionary Income			
	Total Hhlds. (thous.)	After Tax Income		Total No. (thous.)	% of All Hhlds.	Spendable Discret. Income	
		Aggregate (billions)	Average			Aggregate (billions)	Average
Total	82,368	$1,340.4	$16,272	25,292	30.7%	$193.3	$7,644
Age of Householder							
Under 25 years	6,443	74.6	11,584	1,170	18.2	5.4	4,612
25 to 29 years	9,514	142.7	15,002	2,633	27.7	14.2	5,383
30 to 34 years	9,639	163.5	16,959	3,017	31.3	19.4	6,433
35 to 39 years	7,969	150.5	18,884	2,466	30.9	18.9	7,646
40 to 44 years	6,494	132.0	20,334	2,175	33.5	18.3	8,429
45 to 49 years	6,209	133.9	21,566	2,216	35.7	20.3	9,177
50 to 54 years	6,486	132.5	20,423	2,455	37.8	21.6	8,810
55 to 59 years	6,742	128.9	19,123	2,662	39.5	23.9	8,963
60 to 64 years	5,962	96.0	16,098	2,111	35.4	17.8	8,428
65 years & over	16,912	185.7	10,981	4,388	25.9	33.6	7,646

Source: The Conference Board & the U.S. Bureau of the Census,
A Marketer's Guide To Discretionary Income (Nov. 1983)

In 1982, according to the Census Bureau, 74.9 million households (89% of the total) received at least one type of noncash benefit--including means-tested and non-means-tested benefits. A total of 14.6 million households received one or more of the following means-tested benefits: food stamps, free or reduced-price school lunches, public or other subsidized rental housing and Medicaid. Households receiving non-means-tested benefits (Medicare, regular-price school lunches, employer- or union-provided pension plans, and employer- or union-provided group health plans) numbered 69.4 million in 1982.

Families & Unrelated Individuals

Median family income in 1982 was lower for the third consecutive year. However, the decline was significantly less than in the two previous years, according to results of the March 1983 Current Population Survey (Census Bureau). In 1982 the median family income was $23,430, an increase of 4.7% over 1981. After adjusting for the 6.1% increase in consumer prices, median family income declined 1.4%. This compares with the 3.5% decline in real terms in 1980-81, and the 5.5% decline in 1979-80.

Families in large metropolitan areas had their real median income decline by 3.2% in 1982, while smaller metro areas and nonmetro areas showed no change. The 1982 median income for all married-couple families was $26,020 and $30,340 for those with wives in the paid labor force--both down 2.2% from 1981. However, median income for male-household families with no wives present ($20,140) and female-householder families with no husbands present ($11,480) were unchanged. Median income for two-earner families also declined (down 1.5%) in real terms in 1982.

INCOME

Families & Unrelated Individuals

Families & Unrelated Individuals by Total Money Income, 1982
(Numbers in Thousands)

	Families			Unrelated Individuals		
	Total*	White	Black	Total*	White	Black
Total number	61,393	53,407	6,530	27,908	24,300	3,051
Money Income						
Under $10,000	10,205	7,444	2,476	13,980	11,740	1,929
$10,000 - $14,999	7,653	6,461	1,023	4,902	4,330	488
$15,000 - $19,999	7,459	6,572	733	3,423	3,045	307
$20,000 - $24,999	7,575	6,720	698	2,301	2,073	185
$25,000 - $34,999	11,985	10,825	921	2,106	1,972	94
$35,000 - $39,000	4,242	3,864	256	367	338	27
$40,000 - $49,999	5,573	5,183	251	394	384	8
$50,000 - $74,999	4,837	4,552	150	299	292	3
$75,000 & over	1,866	1,782	23	137	125	10
Meidan income	$23,433	$24,603	$13,599	$9,978	$10,414	$6,861
Mean income	27,391	28,603	17,259	12,960	13,465	9,360
% Distrib. of Aggregate Income						
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Lowest fifth	4.7	5.2	3.9	3.8	4.0	3.0
2nd fifth	11.2	11.6	9.1	9.0	9.1	8.3
3rd fifth	17.1	17.2	15.9	15.2	15.3	14.5
4th fifth	24.3	24.1	25.8	24.3	24.3	24.9
Highest fifth	42.7	41.9	45.3	19.0	18.7	18.9

* Total includes races not separately listed. Race is based on that of householder.

Source: U.S. Bureau of the Census, Current Population Reports, (Series P-60, No. 140)

Selected Characteristics of Families: Number & Median Income, 1981, 1982
(Current Dollar Basis)

	1982		1981	Percent Change in Median Income 1982/81
	Number (thous.)	Median Income	Median Income	
All families	61,393	$23,433	$22,388	+ 4.7
Nonfarm	59,777	23,585	22,554	+ 4.6
Farm	1,617	18,756	17,082	+ 9.8
Inside Metro. Areas	41,145	25,423	24,478	+ 3.9
Outside Metro. Areas	20,248	20,100	19,225	+ 4.6

(continued)

Families & Unrelated Individuals

Selected Characteristics of Families: Number & Median Income, 1981, 1982
(Current Dollar Basis)
(continued)

	1982		1981	Percent Change in
	Number (thous.)	Median Income	Median Income	Median Income 1982/81
Region:				
Northeast	12,975	$24,918	$23,706	+ 5.1
North Central	15,721	24,219	23,118	+ 4.8
South	21,111	21,500	20,582	+ 4.5
West	11,586	24,624	23,873	+ 3.1
Size of family				
2 persons	24,392	19,816	18,542	+ 6.9
3 persons	14,189	24,186	23,401	+ 3.4
4 persons	13,039	27,619	26,274	+ 5.1
5 persons	5,970	27,144	26,258	+ 3.4
6 persons	2,329	27,012	16,725	+ 1.1
7 persons or more	1,475	23,569	24,323	- 3.1

Source: U.S. Bureau of the Census, Current Population Reports, (Series P-60, No. 140).

Family Income, 1979-1982 In Constant (1982) Dollars

	1982	1981	1980	1979
Total families (thous.)	61,393	61,019	60,309	59,550
Percent	100.0%	100.0%	100.0%	100.0%
Under $10,000	16.6	16.1	15.4	13.5
$10,000 - $14,999	12.4	12.7	11.7	11.6
$15,000 - $24,999	24.4	24.0	25.1	22.7
$25,000 - $49,999	35.5	36.4	37.8	39.7
$50,000 & over	10.9	10.7	11.0	12.4
Median income	$23,433	$23,761	$24,626	$26,047
Mean income	27,391	27,422	28,083	29,676

Source: U.S. Bureau of the Census, Current Population Reports, (Series P-60, No. 140)

OVERVIEW OF CONSUMERS' FINANCIAL POSITION

Based on Federal Reserve Board data, the real net worth of the nation's consumers by mid-1983 was up 13.5% compared with mid 1982 data, according to an analysis by Goldman Sachs Economics. Total financial assets of consumers rose to 8.9 times their total liabilities (excluding mortgages) in the second quarter of 1983, marking a record high. Mortgages are excluded from liabilities since the value of homes is not included in financial assets.

An overall view of consumer finances as of the second quarter 1983 compared with 1982 and 1979 is covered below.

The Consumer Balance Sheet, 1979, 1982, 2nd Quarter 1983
(Billions of Dollars)

	1983 (2nd Qtr.)	1982	1979
Assets:			
Checkable deposits & currency	$ 326.2	$ 307.3	$ 250.4
Time & savings accounts	1,580.3	1,468.8	1,163.6
Money market fund shares	164.6	206.6	45.2
Open market paper	45.4	41.6	45.3
Savings bonds	69.7	68.3	79.9
Total liquid assets	2,186.3	2,092.7	1,584.4
Total real liquid assets*	734.9	713.5	686.6
Corporate stock (market value)	1,548.7	1,322.3	915.2
All U.S. Treasury securities	316.7	308.6	184.9
Other long-term securities	397.4	380.0	290.8
Total long-term securities	2,262.8	2,011.0	1,390.8
Total financial assets, incl. insurance, pension reserves, misc.	5,871.0	5,384.4	3,861.2
Total real financial assets*	1,973.3	1,835.8	1,673.7
Real financial assets plus real value of 1-4 family residences	2,933.1	2,796.1	2,686.8
Liabilities & net worth:			
Consumer credit	440.9	430.7	383.4
Other liabilities (excl. mortgages)	219.0	209.3	143.6
Financial net worth, excl. mortgages	5,211.1	4,744.4	3,334.3
Real financial net worth, excl. mortgages*	1,751.6	1,617.6	1,445.3
Real financial net worth & real net worth of 1-4 family residences*	2,325.3	2,202.5	2,081.6

* Adjusted for rise in Consumer Price Index.

Source: Goldman Sachs (October 1983)

A small decrease was anticipated in consumer real net worth in the third quarter of 1983. However, as the year progressed there were strong indications of a rise in consumer confidence and willingness to spend. In October 1983 consumer installment debt rose by a record $4.89 billion, according to the Federal Reserve Board. This covers short and medium term loans, not mortgages.

Much of the rise was due to a surge in car sales, particularly imports. On a seasonally adjusted basis, U.S. consumers had $371.56 billion in installment debt outstanding at the end of October 1983, 10.4% above the total a year earlier.

CONSUMER PRICES

Moderation in the rate of inflation contributed to the consumer's ability and willingness to step up spending in 1983. Cost-of-living increases as measured by the Consumer Price Index from December of one year through December of the next showed a 3.8% gain in 1983 compared with 3.9% in 1982, a rise of 8.9% in 1981, a 12.4% gain in 1980. The December 1983 reading was the lowest reported by the BLS since 1972.

Consumer Price Index For All Urban Consumers
Annual Averages, 1981, 1982, 1983
(1967 = 100)

	1983	1982	1981
All items	298.4	289.1	272.4
Food & beverages	284.4	278.2	267.3
Housing	323.1	314.7	293.5
Fuel & other utilities	370.3	350.8	319.2
Household furnishings & operation	238.5	233.2	221.3
Apparel & upkeep	196.5	191.8	186.9
Men's & boys' apparel	188.9	183.9	177.5
Women's & girls'	161.9	159.1	157.5
Infants' & toddlers'	282.7	269.4	259.8
Footwear	206.9	205.5	200.4
Other apparel	214.9	211.6	213.5
Transportation	298.4	291.5	280.0
Medical care	357.3	328.7	294.5
Entertainment	246.0	235.8	221.4
Other goods & services	288.3	259.9	235.7

Source: U.S. Bureau of Labor Statistics

PERSONAL CONSUMPTION EXPENDITURES

Spending by consumers for Christmas 1983 was at a much brisker pace than had been expected and retailers ended the year on a very high note. In November 1983 the seasonally adjusted annual rate of personal consumption expenditures rose a strong 1.1% over the October level, and the total for the year is expected to reach $2,150 billion--8% ahead of the 1982 total. However, gains in spending are outpacing gains in personal income, and consumers will not be able to sustain the course prevailing at the end of 1983. Analysts look for increases in personal consumption expenditures next year to slow down to a 4% annual rate. Trends in interest rates will of course be a factor in consumer spending plans.

PERSONAL CONSUMPTION EXPENDITURES

Spending for all nondurable goods (seasonally adjusted annual rate) rose 1% in November 1983 to $833.2 billion. This compares with a rise in October of 0.9%; in September, 0.5%. Spending for durable goods climbed 1.8% in November, to an adjusted annual rate of $295.6 billion, following a 2.5% gain in October.

Personal Consumption Expenditures, 1979-1982, Annual Rate 1983 3rd Quarter

	Billions of Dollars				% Change	
	3rd Qtr. 1983 Rate	1982	1981	1979	1983/ 1982	1982/ 1981
Personal consumption expends., total	$2,186.5	$1,991.9	$1,857.2	$1,507.2	+ 9.8%	+ 7.2%
Selected groups:						
Durable goods	284.2	244.5	236.1	213.4	+16.2	+ 3.5
Motor vehicles/parts	137.2	109.9	101.6	96.6	+24.8	+ 8.2
Furniture/hhld. equip.	102.8	93.5	93.3	81.8	+ 9.9	+ 0.2
Nondurable goods	818.7	761.0	733.9	600.0	+ 7.6	+ 3.7
Food	428.8	396.9	375.9	311.6	+ 8.0	+ 5.6
Clothing & shoes	125.5	119.0	115.3	99.1	+ 5.5	+ 3.2
Gasoline & oil	93.4	91.5	94.6	66.6	+ 2.1	- 3.3
Services	1,083.6	986.4	887.1	693.7	+ 9.8	+11.2

Source: U.S. Department of Commerce, Bureau of Economic Analysis.

In the third quarter of 1983 personal consumption expenditures, including total spending for all goods and services, represented 65% of total gross national product. This compares with a 64.8% share in 1982; 62.3% in 1979.

Per capita personal consumption expenditures in terms of a constant dollar registered the following real growth in 1983 compared with 1982: first quarter, up 1.7%; second quarter, up 3.3%; third quarter, up about 4.0%.

The Bureau of Labor Statistics has prepared trend projections on the economy for the 1990's. In terms of a constant 1972 dollar, there were three sets of projections on the average annual rate of change expected in personal consumption expenditures by 1990 compared with 1982: high: +3.7%; moderate: + 3.1%; low: + 2.7%. (Monthly Labor Review, November 1983). Spending for durable goods and services is generally expected to grow at a faster pace than spending for nondurables.

PERSONAL CONSUMPTION EXPENDITURES

The Bureau of Economic Analysis, Department of Commerce, has compiled detailed information on personal consumption expenditures by major product categories. This covers the value at retail of goods (new and used) reaching the consumer through any channel--including retail outlets, premiums, direct sales by manufacturers and wholesalers, etc.

Personal Consumption Expenditures For Selected Product Categories, 1979, 1981, 1982
(Millions of Current Dollars)

	1982	1981(r)	1979	% Change 1982/1981
Total disposable personal income	$2,176,537	$2,047,621	$1,650,155	+ 8.3%
Total personal consumption expenditures	1,991,861	1,857,180	1,507,165	+ 7.2
Durable goods	244,459	236,142	213,441	+ 3.5
Nondurable goods	761,014	733,903	600,028	+ 3.7
Services	986,388	887,135	693,696	+11.2
Selected Expenditures				
Food & non-alcoholic beverages, total*	347,840	328,443	272,246	+ 5.9
Food for off-premise consumption**	282,595	270,285	223,360	+ 4.5
Purchased meals and beverages**	107,152	98,921	82,475	+ 8.3
Tobacco products	24,960	23,044	19,258	+ 8.3
Alcoholic beverages	49,087	47,431	38,696	+ 3.5
Toilet articles & preparations	16,898	16,115	13,600	+ 4.8
Drug preparation & sundries (not including products dispensed by doctors, hospitals, etc.)	19,945	18,765	15,754	+ 6.3
Clothing & accessories (not including standard military clothing or jewelry, or footwear, but including luggage)	98,637	95,778	82,744	+ 3.0
Women's & children's	64,908	62,779	54,088	+ 3.4
Men's & boys'	33,729	32,999	28,656	+ 2.2
Footwear, total	20,276	19,395	16,291	+ 4.5
Women's & children's (estimated)	12,227	11,637	9,400	+ 5.1
Men's & boys' (estimated)	8,049	7,758	6,891	+ 3.7
Jewelry & watches	12,186	12,172	9,537	- 0.1

(continued)

Personal Consumption Expenditures For Selected Product Categories, 1979, 1981, 1982

(Millions of Current Dollars)
(continued)

	1982	1981(r)	1979	% Change 1982/1981
Home furnishings, household supplies	$126,553	$125,020	$108,364	+ 1.2%
Furniture & bedding	19,151	19,853	18,236	- 3.5
Major appliances, electric housewares	19,557	19,508	16,837	+ 0.2
Dinner & tableware, glassware, utensils	9,554	9,388	7,888	+ 1.8
Other durable house furnishings#	20,642	20,192	17,978	+ 2.2
Floor coverings	nr	nr	6,971	--
Semi-durable house furnishings##	10,697	10,453	8,926	+ 2.3
Home entertainment (TV, radios, records, musical instruments, etc.)	24,604	24,359	20,860	+ 1.0
SUB-TOTAL: Home furnishings, excl. misc. household supplies, etc.	104,205	103,753	90,725	+ 0.4
Misc. household supplies, cleaning prepartions, paper products, etc.	22,348	21,267	17,639	+ 5.1

(r) = revised (nr) = not reported

* Includes expenditures not separately shown, such as the value of food furnished to government and commercial employees, etc.

**Includes alcoholic beverages, and to this extent the figure on consumption of alcoholic beverages shown separately is duplicated.

# Principal furnishings included in "other durable house furnishings" are floor coverings, blankets, comforters, pillows, picture frames, mirrors, art products, lamps, clocks, writing equipment, hand and power tools, garden tools are also included.

\##Consists mainly of textile home furnishings except where elsewhere classified, including piece goods for home furnishings. Also includes lamp shades, brooms, and brushes.

Note: Columns may not add to totals shown due to rounding of figures and/or expenditure categories included in totals but not separately reported.

Source: Based on reports from the Bureau of Economic Analysis, U.S. Department of Commerce.

When measured in a constant (1972) dollar, total personal consumption expenditures in 1982 were up only 1.4% compared with 1981. For the year 1982 a gain of 2.7% was chalked up in real terms compared with 1981.

Personal Consumption Expenditures By Major Type of Product In Constant Dollars
(Billions of 1972 Dollars)

	1982	1981	1979	% Change 1982/1981
Personal consumption expends., total	$970.2	$956.8	$927.6	+ 1.4%
Durable goods	139.8	141.2	147.2	- 1.0
Motor vehicles, parts	57.4	56.0	62.6	+ 2.5
Furniture & household equip.	59.7	61.7	60.4	- 3.2
Nondurable goods	364.2	362.5	353.1	+ 0.5
Food	184.0	181.8	176.1	+ 1.2
Clothing & shoes	84.4	83.2	76.7	+ 1.4
Gasoline & oil	25.6	25.2	27.4	+ 1.6
Services	466.2	453.1	427.3	+ 2.9
Housing	171.3	166.7	154.8	+ 2.8
Household operation	63.5	63.0	60.1	+ 0.8

Source: U.S. Department of Commerce,
Bureau of Economic Analysis

An ongoing Consumer Expenditure Survey is now being compiled by the Bureau of Labor Statistics to provide a continuous flow of data on the buying habits of American consumers and to provide a basis for future revisions of the Consumer Price Index. Data on the Diary (not the personal interview) component of this program covering data collected during 1980 and 1981 were reported by the BLS in September 1983, updating information on consumer purchases of food alcoholic beverages, tobacco products, personal care products and drugs, housekeeping supplies and energy. This updates data last collected by the BLS in 1972-1973.

Additional details on the Diary survey component as well as the Interview component (which will cover other expenditures) will be released by the BLS in 1984.

Average Weekly Expenditures of Urban Consumer Units
Diary Survey, 1972-73, 1980-81 & Change in Consumer Price Index

	1980-1981	1972-1973	% Change In CPI 1972-73 to 1980-81
Number of consumer units in universe (thousands)	70,040	59,159	--
Average size of consumer unit	2.6	2.8	--
Children under 18	0.7	0.9	--
Average weekly expenditures (selected information)			
Food at home, total	$34.15	$23.79	84.6%
Food away from home	16.35	9.32	95.7
Alcoholic beverages	5.20	2.32	56.4
Tobacco prods., supplies	2.89	2.19	53.9
Personal care prods., supplies	3.95	2.92	76.7
Nonprescription drugs, supplies	1.62	1.19	66.8
Housekeeping supplies	4.16	2.62	115.4
Energy, total	32.22	13.12	198.2

Source: U.S. Bureau of Labor Statistics, Consumer Expenditure Survey: Diary Survey, 1980-81 (Bulletin 2172, Sept. 1983)

FAIRCHILD FACT FILES AVAILABLE FOR 1983

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

DEPARTMENT STORE SALES: Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included.

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and findings in a comprehensive consumer survey conducted by *Footwear News Magazine*. ($15.00)

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits.

PERSONAL ELECTRONICS: A statistical summary of the market for electronic equipment designed for individuals. Product categories include televisions, radios, stereos, personal stereos, home computers, videosystems and videogames. Data is presented on both the manufacturer and the retailer level. Also includes a section on consumer buying habits. (Special Fact File for 1983, $15.00)

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers, on production and value of shipments of major types of soft surface floor coverings, and foreign trade, are covered in this report. Retailing information includes departmental merchandising and operating results, estimated volume by type of outlet and trends in consumer buying.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and in physical fitness. (Special Fact File for 1982, $15.00)

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery.

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

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Household Furniture and Bedding (Mattresses and Dual-Purpose Sleep Furniture)

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E. B. Gold, Manager
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HOUSEHOLD FURNITURE & BEDDING

Market Trends

Following a strong 1983, the near-term outlook for the household furniture and bedding market seems bright. According to the national accounting firm of Seidman & Seidman, 1983 was the best year for the furniture industry since 1979. Through the first 10 months of 1983, according to the National Association of Furniture Manufacturers reports, the value of furniture shipments was ahead of the same 1982 period by 18%, with new orders up 24%. In an October 1983 forecast, the NAFM predicted that furniture shipments would rise 19.1% for all of 1983 and an additional 16.7% in 1984.

The 1983 industry recovery, after the value of shipments had fallen to a five-year low in 1982, has been fueled by the rise in both housing starts and housing sales. Sales of new homes surged 52% over 1982 to 625,000 units while housing resales in 1983 were an estimated 2.7 million, 36% higher than the previous year. Furniture sales have also been propelled by an increase in disposable income as well as a decline in interest rates. On a constant 1972 dollar basis, disposable personal income gained 2.5% (based on the first three quarters of 1983) in 1983 over 1982. The University of Michigan's Survey of Consumer Attitudes found that 27% of consumers were not reluctant to incur new debt in the third quarter of 1983, more than twice the 12% recorded one year earlier.

During the five-year period ending in 1988, the value of household furniture and bedding shipments is expected to increase at a "real" (inflation-removed) rate of 4.0% annually, according to the 1984 U.S. Industrial Outlook (U.S. Bureau of Industrial Economics). Furniture categories for which growth is anticipated to be exceptionally high include downsized furniture (to meet the needs of consumers with smaller homes and rooms), multifunctional products, the furniture designed to house new electronic devices and home computers.

Approximately 13.3 million bedding units were sold in 1983, of which 2 million, or 15%, were waterbeds. By 1985, according to the Waterbed Manufacturers Association, they will represent about one-fifth of all bedding purchases. Retail sales of these beds were up 17.5% in 1982 to $1.5 billion.

GENERAL INDUSTRY STATISTICS

AT THE MANUFACTURER LEVEL

The 1981 Annual Survey of Manufactures, compiled by the U.S. Bureau of the Census, provides the latest available information on household furniture and bedding at the manufacturer level. The ASM is based on a sample of manufacturers and is conducted between the complete census of manufactures conducted every five years. It is adjusted for comparability with the most recent census covering the year 1977.

In 1983, the total value of industry shipments (including both primary and secondary products and miscellaneous receipts) in the household furniture and bedding industry reached $14.2 billion, up 13.6% over the estimated 1982 shipment value of $12.5 billion, according to the 1984 U.S. Industrial Outlook published by the Bureau of Industrial Economics.

GENERAL INDUSTRY STATISTICS

Profile of the U.S. Furniture & Bedding Manufacturing Industry
1979, 1980, 1981

Wood Household Furniture (SIC 2511*)

	1981	1980	1979	% Change 1981/1980
Number of companies	na	na	na	na
Number of establishments, total**	2,106	2,109	2,155	- 0.1%
Number with 20 or more employees	828	799	856	+ 3.6
Employees, total (thous.)	134.7	138.1	140.1	- 2.5
Production workers (thous.)	116.8	119.5	122.1	- 2.3
Payroll (mil. $)	$1,478.1	$1,370.0	$1,334.3	+ 7.9
Value added by manufacture# (mil. $)	2,912.7	2,708.2	2,670.7	+ 7.5
Value of industry shipments## (mil. $)	5,321.7	5,008.5	4,942.3	+ 6.2
Capital expenditures, new (mil. $)	125.1	136.8	153.8	- 8.5

Upholstered Household Furniture (SIC 2512*)

	1981	1980	1979	% Change 1981/1980
Number of companies	na	na	na	na
Number of establishments, total**	1,176	1,220	1,303	- 3.6%
Number with 20 or more employees	647	679	707	- 4.7
Employees, total (thous.)	83.2	89.0	95.0	- 6.5
Production workers (thous.)	70.3	75.0	81.4	- 6.3
Payroll (mil. $)	$ 959.3	$ 959.2	$ 951.9	--
Value added by manufacture# (mil. $)	1,829.9	1,739.4	1,747.6	+ 8.8
Value of industry shipments## (mil. $)	3,860.0	3,721.6	3,641.6	+ 3.7
Capital expenditures, new (mil. $)	84.6	72.3	67.1	+17.0

Metal Household Furniture (SIC 2514*)

	1981	1980	1979	% Change 1981/1980
Number of companies	na	na	na	na
Number of establishments, total**	401	412	422	- 2.7%
Number with 20 or more employees	214	219	216	- 2.3
Employees, total (thous.)	29.8	31.6	34.4	- 5.7
Production workers (thous.)	24.4	26.2	28.0	- 6.9
Payroll (mil. $)	$ 358.5	$ 345.3	$ 352.1	+ 3.8
Value added by manufacture# (mil. $)	789.0	739.9	772.1	+ 6.6
Value of industry shipments## (mil. $)	1,546.5	1,467.7	1,506.9	+ 5.4
Capital expenditures, new (mil. $)	27.9	34.1	29.9	-18.2

(continued)

GENERAL INDUSTRY STATISTICS

Profile of the U.S. Furniture & Bedding Manufacturing Industry
1979, 1980, 1981
(continued)

Mattresses & Bedsprings (SIC 2515*)

	1981	1980	1979	% Change 1981/1980
Number of companies	na	na	na	na
Number of establishments, total**	822	856	883	- 4.0%
Number with 20 or more employees	335	344	370	- 2.6
Employees, total (thous.)	28.3	27.8	28.8	+ 1.8
Production workers (thous.)	21.1	20.8	21.7	+ 1.4
Payroll (mil. $)	$ 367.9	$ 341.3	$ 333.2	+ 7.8
Value added by manufacture# (mil. $)	1,027.1	894.6	810.6	+14.8
Value of industry shipments## (mil. $)	2,171.8	1,934.8	1,760.1	+12.2
Capital expenditures, new (mil. $)	36.3	23.0	20.5	+57.9

Wood TV & Radio Cabinets (SIC 2517*)

	1981	1980	1979	% Change 1981/1980
Number of companies	na	na	na	na
Number of establishments, total**	74	80	78	- 7.5%
Number with 20 or more employees	39	45	44	-13.3
Employees, total (thous.)	7.0	7.5	8.4	- 6.7
Production workers (thous.)	6.1	6.5	7.1	- 6.1
Payroll (mil. $)	$ 84.7	$ 80.5	$ 81.4	+ 5.2
Value added by manufacture# (mil. $)	149.6	139.9	123.7	+ 6.9
Value of industry shipments## (mil. $)	291.9	279.0	261.7	+ 4.6
Capital expenditures, new (mil. $)	4.8	3.8	6.4	+26.3

Household Furniture Not Elsewhere Classified (SIC 2519*)

	1981	1980	1979	% Change 1981/1980
Number of companies	na	na	na	na
Number of establishments, total**	174	178	169	- 2.2%
Number with 20 or more employees	72	73	71	- 1.4
Employees, total (thous.)	9.2	9.1	8.8	+ 1.1
Production workers (thous.)	7.7	7.6	7.6	+ 1.3
Payroll (mil. $)	$ 121.6	$ 109.2	$ 99.0	+11.3
Value added by manufacture# (mil. $)	199.6	179.5	139.4	+11.2
Value of industry shipments## (mil. $)	466.5	412.3	353.8	+13.1
Capital expenditures, new (mil. $)	17.6	18.1	13.2	- 2.8

(see footnotes on next page)

GENERAL INDUSTRY STATISTICS

na = not available

*Manufacturers are classified by industry under the Standard Industrial Classification (SIC) system determined by the principal product made, as shown below:

SIC 2511 comprises establishments primarily engaged in manufacturing wood household furniture used in dwellings, not including upholstered pieces, but including infants' and children's wood furniture and wood outdoor furniture.

SIC 2512 comprises establishments primarily manufacturing upholstered furniture on wood frames.

SIC 2514 covers establishments primarily engaged in manufacturing metal household furniture, padded or plain, but not dual-purpose sleep furniture.

SIC 2515 comprises manufacturers of mattresses (innerspring, box, etc.) and dual-purpose sleep furniture (studio couches, sofa beds, chair beds). This industry is referred to as the "Bedding Industry" in this Fact File.

SIC 2517 comprises manufacturers of wood TV, radio, phonograph and sewing machine cabinets.

SIC 2519 comprises establishments primarily manufacturing reed, rattan, and other wicker furniture, plastic and fiberglass household furniture and cabinets, and household furniture not elsewhere classified.

**Each business location is counted as a separate establishment. Data includes only establishments with payrolls, as reported in County Business Patterns.

#Value added by manufacture is derived by subtracting the cost of finished products, materials, supplies, fuel, contract work, etc., from the value of shipments (including resales of finished products) plus the net change in the value of finished products and work-in-process inventories between the beginning and end of the year, without adjustment for price changes.

##Value of industry shipments represents the net selling values, f.o.b. plant, after discounts and allowances, and excluding freight charges and excise taxes, and includes both products described as primary to the industry as well as secondary products and miscellaneous receipts. This value should be clearly distinguished from the total value of furniture and bedding manufactured by all producers, including those classified in other industries. This total product value is shown in the table on page 15.

Source: U.S. Bureau of the Census,
Annual Survey of Manufactures 1979,
1980, 1981.

GENERAL INDUSTRY STATISTICS

Over the 11 year period ended in 1983, the value of household furniture and bedding shipments has declined by -0.2% annually on a constant (1972) dollar basis. However, the shipment value measured in constant dollars, is expected to rise 9.5% in 1984 compared with 1983, according to the Bureau of Industrial Economics.

Value of Furniture & Bedding Industry Shipments
on a Constant 1972 Dollar Basis

	Constant 1972 Dollars	
	Compound Annual Growth Rate 1972-1983	% Change 1984/1983
Household furniture (SIC 251)	- 0.2%	+ 9.5%
Wood household furniture (SIC 2511)	- 1.0	+ 10.1
Upholstered household furniture (SIC 2512)	+ 0.8	+ 9.1
Metal household furniture (SIC 2514)	- 1.3	+ 9.3
Mattresses & bedsprings (SIC 2515)	+ 1.7	+ 9.8
Wood TV & radio cabinets (SIC 2517)	- 7.6	+ 8.8
Household furniture, n.e.c. (SIC 2519)	+ 2.3	+ 7.8

Source: U.S. Bureau of Industrial Economics
1984 U.S. Industrial Outlook

Employment & Earnings

An average of 123,000 workers (of which 106,000 were production workers) were employed in the wood household furniture industry in the first 10 months of 1983, 1.2% higher than the average number employed in the 1982 calendar year. Production workers' average weekly salary in the January to October 1983 period was 11.1% higher, at $214.65, than in 1982.

The number of employees in the upholstered household furniture industry rose 5.9% to an average of 88,200 in the 1983 time frame and production workers increased in average numbers by 6.3% over 1982. Wages for production workers gained 11.2% to a weekly average of $247.02.

GENERAL INDUSTRY STATISTICS

Employment & Earnings in the Furniture & Bedding Industry
1981, 1982 & January-October 1983

	Jan.-Oct. 1983 Average	Annual Averages		% Change 10 months 1983/ 12 months 1982
		1982	1981	
Wood household furniture (SIC 2511)				
Total employees (thous.)	123.0	121.5	133.5	+ 1.2%
Production workers (thous.)	106.0	104.3	115.7	+ 1.6
Avg. weekly earnings	$ 214.65	$ 193.14	$ 194.69	+ 11.1
Avg. hourly earnings	5.55	5.35	5.07	+ 3.7
Avg. weekly hours	38.6	36.1	38.4	+ 6.9
Upholstered household furniture (SIC 2512)				
Total employees (thous.)	88.2	83.3	89.4	+ 5.9
Production workers (thous.)	71.2	67.0	73.1	+ 6.3
Avg. weekly earnings	$ 247.02	$ 222.14	$ 217.56	+ 11.2
Avg. hourly earnings	6.48	6.24	5.88	+ 3.8
Avg. weekly hours	38.1	35.6	37.0	+ 7.0
Metal household furniture (SIC 2514)				
Total employees (thous.)	27.2	26.0	30.5	+ 4.6
Production workers (thous.)	22.9	20.7	24.8	+ 10.6
Avg. weekly earnings	$ 253.58	$ 238.07	$ 221.94	+ 6.5
Avg. hourly earnings	6.29	6.12	5.72	+ 2.8
Avg. weekly hours	40.3	38.9	38.8	+ 3.6
Mattresses & bedsprings (SIC 2515)				
Total employees (thous.)	28.4	27.8	30.4	+ 2.2
Production workers (thous.)	21.5	20.8	23.3	+ 3.4
Avg. weekly earnings	$ 270.63	$ 235.06	$ 224.48	+ 15.1
Avg. hourly earnings	6.94	6.44	6.10	+ 7.8
Avg. weekly hours	39.0	36.5	36.8	+ 6.8

Source: Bureau of Labor Statistics, Employment & Earnings.

GENERAL INDUSTRY STATISTICS

Concentration in the Industry

Number of Manufacturing Establishments in the Furniture & Bedding Industry
By Employment Size, 1981
(Includes only establishments with payrolls)

	SIC 251 Household Furniture	SIC 2511 Wood Household Furniture	SIC 2512 Upholstered Household Furniture	SIC 2514 Metal Household Furniture
Total establishments	4,790	2,106	1,176	401
Number by employment size:				
Under 20 employees	2,653	1,278	529	187
20-49 employees	912	350	240	77
50-99 employees	514	174	174	42
100-499 employees	620	249	216	86
500 employees or more	91	55	17	9

	SIC 2515 Mattresses & Bedsprings	SIC 2517 Wood TV & Radio Cabinets	SIC 2519 Household Furniture, n.e.c.
Total establishments	822	74	174
Number by employment size:			
Under 20 employees	487	35	102
20-49 employees	191	19	34
50-99 employees	99	9	15
100-499 employees	44	4	21
500 employees or more	1	7	2

n.e.c. = not elsewhere classified.

Source: U.S. Bureau of the Census,
County Business Patterns 1981.

Concentration Ratios in Furniture & Bedding Manufacturing, 1977

	Value of Shipments* (Mil. $)	Percent Accounted For By			
		4 largest companies	8 largest companies	20 largest companies	50 largest companies
Wood household furniture, total	$3,890.7	14%	22%	37%	54%
Wood living room, library, family room & den furniture, exc. sewing cabinets	859.8	15	25	46	69
Wood dining room & kitchen furniture, exc. cabinets	962.3	23	36	59	81
Wood bedroom furniture	1,290.3	21	34	56	80
Infants' & children's wood furniture	118.8	44	70	94	100
Wood outdoor furniture & unpainted, unassembled wood furniture	185.8	37	55	75	93
Upholstered wood household furniture, total	2,735.7	14	23	34	49

(continued)

GENERAL INDUSTRY STATISTICS

Concentration in the Industry

Concentration Ratios in Furniture & Bedding Manufacturing, 1977
(continued)

	Value of Shipments* (Mil. $)	Percent Accounted For By			
		4 largest companies	8 largest companies	20 largest companies	50 largest companies
Metal household furniture, total	$1,231.2	13%	22%	47%	61%
Metal household dining & dinette furniture	319.1	39	55	80	98
Metal kitchen furniture	73.4	52	74	96	100
Metal porch, lawn, outdoor & casual furniture	275.9	33	51	81	99
Other metal household furniture	445.5	18	31	57	87
Wood TV, radio, stereo & sewing machine cabinets, total	312.8	47	73	88	97
Household furniture, n.e.c.	281.8	27	38	61	82
Mattresses & bedsprings, total	1,481.5	18	28	39	54
Innerspring mattresses, exc. crib size	492.6	29	38	51	70
All other mattresses	108.3	43	52	66	83
Bedsprings	360.6	30	43	56	74
Convertible sofas	302.6	22	36	58	77
Other dual-purpose sleep furniture	31.8	43	59	82	97

*Value of shipments from all producers, regardless of industry classification.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Subject Series MC77-SR-9.

As part of the 1978 Annual Survey of Manufactures, the publication Statistics for States, SMSA's, Counties & Cities (discontinued in subsequent surveys) contained information on household furniture industry shipments by leading states. Plants in North Carolina accounted for 22.6% of total industry dollar shipments in 1978.

In 1978, total shipments from plants classified in the wood TV and radio cabinets industry (including secondary products and miscellaneous receipts) were valued at $340.7 million. Almost 40% of this total was shipped from plants in Indiana, with a shipment value of $136.0 million. The value of shipments of the mattresses and bedsprings industry was $1.5 billion in 1978. Ohio plants accounted for $129.6 million, or 8.6%, and Texas factories represented 8.0% of the total.

GENERAL INDUSTRY STATISTICS

Concentration in the Industry

Value of Shipments in the Household Furniture Industry By Leading States, 1978

	Employment (Thous.)	Value Added by Manufacturer (Mil. $)	[illegible]e of Industry Shipments (Mil. $)
Household furniture (SIC 251)	316.5	$ 5,920.1	$ 11,916.2
North Carolina	74.8	1,385.8	2,695.4
California	37.2	774.8	1,629.3
Virginia	24.2	427.9	809.0
Tennessee	18.6	310.7	635.4
Mississippi	13.8	248.6	532.8
Indiana	14.6	255.1	528.9
Illinois	11.5	235.3	489.8
New York	11.6	231.7	425.8
Pennsylvania	9.7	209.4	411.1
Texas	11.4	202.7	406.9
Ohio	9.0	189.1	398.0
Wood household furniture (SIC 2511)	147.0	2,586.8	4,864.4
North Carolina	42.6	779.1	1,404.1
Virginia	19.1	326.8	607.8
California	13.9	252.3	577.2
New York	5.7	105.1	184.5
Arkansas	4.8	73.9	159.4
Pennsylvania	3.8	87.3	145.3
Texas	4.2	64.6	116.2
Mississippi	4.0	65.6	110.4
Georgia	3.1	44.6	100.6
Massachusetts	2.8	44.1	95.8
Wisconsin	2.7	48.6	92.0
Upholstered household furniture (SIC 2512)	89.4	1,679.3	3,429.8
North Carolina	28.1	537.1	1,134.7
California	10.6	228.0	441.1
Mississippi	7.9	145.8	332.6
Tennessee	7.5	111.1	237.2
Texas	3.5	61.8	119.3
Virginia	2.5	45.3	90.9
Pennsylvania	2.2	47.0	90.5
Illinois	2.5	46.6	88.7
New York	2.2	46.1	80.6
Indiana	2.3	37.2	79.4
Arkansas	2.3	37.3	78.5
Metal household furniture (SIC 2514)	34.1	695.0	1,450.2
California	6.3	152.8	280.2
Illinois	4.2	101.5	214.2
Tennessee	2.1	47.0	94.6
Pennsylvania	2.1	36.1	92.4
North Carolina	2.3	38.9	87.4
New York	2.0	40.8	80.1

Source: Based on Annual Survey of Manufactures, 1978 (M78-AS-6).

GENERAL INDUSTRY STATISTICS

Operating Ratios

The latest report issued in the annual line of business survey series conducted by the Federal Trade Commission covered the year 1976. Manufacturers of household furniture ranked 194 out of 234 manufacturing industries in operating income as a percent to assets. Total selling expense, which includes not only media expenditures but also expenditures for sales salaries and expenses, as a percent to sales was 9.1% in 1976, well above the 6.6% U.S. average.

Selected Operating Ratios of U.S. Manufacturers
& Household Furniture Manufacturers, 1976

	U.S. Manufacturers Weighted Average	Household Furniture Manufacturers	Rank Among All U.S. Industries (Out of 234)
Operating income, % to assets	10.3%	8.0%	194
Operating income, % to sales	7.7	5.2	189
Total selling expense, % to sales	6.6	9.1	92
Media advertising expense, % to sales	1.2	1.5	70
Research & development expense, % to sales	1.9	0.3	124

Source: Federal Trade Commission,
Annual Line of Business Report 1976
(Issued May 1982)

PRODUCTION

The level of industrial production in the household furniture industry, as measured by the Federal Reserve Board, spurted ahead 16.9% in the January through October 1983 period compared with the annual index for 1982. This index is a measure of the physical output of all factories in the industry, expressed as a percentage of production in a base year, currently 1967.

Industrial Production Index for the Household Furniture Industry
1978-1982 & January to October 1983
(1967 = 100)

	Jan.-Oct. 1983	1982	1981	1980	1979	1978	% Change 10 months 1983/ Full year 1982
Household furniture (SIC 251)	167.0	142.8	151.7	144.4	161.9	149.3	+ 16.9%

Source: Federal Reserve Board of Governors,
Industrial Production, G12.3.

SHIPMENTS

Measured in constant 1972 dollars, which eliminates the effect of inflation, the value of household furniture shipments in 1984 is expected to rise 9.5% compared with 1983. During the 1972-1983 period, the compound annual growth rate for household furniture was a -1.9%.

Percent Change in the Value of Constant (1972) Dollar Shipments of Household Furniture by All U.S. Producers, 1982 - Forecasted 1984

	Constant (1972) Dollars		Compound Annual Growth Rate 1972-1983
	% Change Forecasted 1984/1983	% Change 1983/1982	
Household furniture, total	+ 9.5%	+ 11.7%	- 1.9%
Wood household furniture	+ 10.0	+ 11.0	- 0.7
Upholstered household furniture	+ 11.0	+ 15.0	+ 0.5
Metal household furniture	+ 9.3	+ 11.0	- 1.3
Mattresses & bedsprings	+ 9.8	+ 9.9	+ 1.4
Wood TV & radio cabinets	+ 8.4	+ 4.9	- 6.5
Household furniture, n.e.c.	+ 7.8	+ 6.5	+ 1.1

n.e.c. = not elsewhere classified.

Source: U.S. Bureau of Industrial Economics
1984 U.S. Industrial Outlook

SHIPMENTS

Furniture

In their October 1983 newsletter, the National Association of Furniture Manufacturers forecast the value of furniture shipments to 1985. According to the Association, industry shipments were valued at $11.6 billion, a 19.1% increase over 1982. By 1985, the value of furniture shipments is expected to rise to $14.2 billion.

Dollar shipments of wood furniture increased 16.8% in 1983 and are expected to gain 22.1% in 1984, while the value of upholstered furniture shipments rose 19.6% in 1983 and will rise 8.7% in 1984. The reason upholstery shipments peak prior to wood shipments is because new upholstery is often used to upgrade the appearance of an existing house, but new construction or resales of existing houses is typically important for casegoods growth. Residential construction is projected by the NAFM to grow 39.7% in 1983 and an additional 13.8% in 1984.

The NAFM anticipates that unit shipments of furniture will grow 15.7% in 1983 versus 1982 and 10.0% in 1984 compared with 1983. These gains will bring the quantity shipped to within 2% of the peak year 1978, when unit shipments were their highest in history. In 1985, the quantity of furniture shipments is expected to rise only 0.3% as the economy slows down, according to the association.

Value of Furniture Shipments, 1982 & Forecasts for 1983-1985
(In Billions of $)

	1985(f)	1984(f)	1983(f)	1982
Total industry shipments	$14.233	$13.504	$11.575	$ 9.722
% change from previous year	+ 5.4%	+16.7%	+19.1%	- 8.6%
Adjusted for inflation	+ 0.3	+10.0	+15.7	- 13.1
Wood furniture shipments	$ 6.976	$ 6.680	$ 5.473	$ 4.687
% change from previous year	+ 4.4	+22.1	+16.8	- 9.7
Adjusted for inflation	- 1.0	+15.5	+12.4	- 14.1
Upholstered furniture shipments	$ 4.430	$ 4.172	$ 3.839	$ 3.211
% change from previous year	+ 6.2	+ 8.7	+19.6	- 9.7
Adjusted for inflation	+ 1.5	+ 3.8	+18.1	- 14.1
Metal furniture shipments	$ 2.827	$ 2.652	$2.263	$1.825
% change from previous year	+ 6.6	+17.2	+24.0	- 3.8
Adjusted for inflation	+ 1.1	+ 9.7	+18.5	- 9.2

(f) = forecasted

Source: National Association of Furniture Manufacturers, The Furniture Executive, October 1983

Over the first 10 months of 1983, the value of shipments in the furniture industry was 18% higher than a year ago while the value of new orders was 24% higher than in the January to October 1982 period, according to the National Association of Furniture Manufacturers. The shipment value of recliners increased 32% compared with the same 1982 period, with an identical percentage rise in the value of new orders.

SHIPMENTS

Furniture

The October 1983 value of shipments in the furniture industry increased 22% over the October 1982 shipment value. New orders were up 18% and unfilled orders were up 31% in October 1983 from October 1982.

Percent Changes in the Value of Furniture Shipments & New & Unfilled Orders, January-October 1983 vs. 1982, October 1983 vs. 1982

	January-October 1983/ January-October 1982		October 1983/October 1982		
	Value of Shipments	New Orders	Value of Shipments	New Orders	Unfilled Orders
Industry, total	+18%	+24%	+22%	+18%	+31%
Case goods	+14	+25	+24	+30	+46
Upholstered furniture	+22	+25	+24	+ 9	+17
Occasional tables	+17	+14	+37	+ 5	+69
Recliners	+32	+32	+24	+ 5	nr
Summer & casual furniture	+12	+13	+ 7	+11	+11

nr = not reported.

Source: National Association of Furniture Manufacturers, *Monthly Statistical Report*, November 1983

Using 1972 as the base year (equal to 100) the National Association of Furniture Manufacturers measures the changes in new orders and the value of shipments of selected furniture groups. The resulting index on the value of shipments of tables rose 54.5% in October 1983 compared with the year 1982. The value of new orders in October 1983 increased more than 50% over 1982 (relative to the 1972 base) for both case goods (50.4%) and recliners (58.9%). New orders for tables fell 4.5% in October 1983 versus 1981, the only category that was lower in October 1983 than it was in 1981.

Trends in Furniture Shipments & New Orders, 1981, 1982 & October 1983
(Indexes, 1972=100)

	Value of Shipments			New Orders		
	October 1983	1982	1981	October 1983	1982	1981
Industry, total	194	158	176	197	144	160
Case goods	213	161	178	191	127	147
Upholstered furniture	184	151	171	186	155	167
Tables	377	244	258	170	148	178
Recliners	299	209	218	356	224	219

Source: National Association of Furniture Manufacturers, *Monthly Statistical Report* November 1983

SHIPMENTS

Bedding

Through the first 10 months of 1983, shipments of mattresses and foundations were valued 18.9% higher than the same year-ago period, while unit shipments registered a 16.0% gain.

Percent Change in the Quantity & Value of Bedding Shipments
January - October 1982, 1983

	10 months 1983 vs. 10 months 1982		
	Quantity	Value	Unit Price
Mattresses			
Innerspring, other than crib	+ 16.3%	+ 19.6%	+ 2.9%
Foam core, other than crib	+ 8.1	+ 9.1	+ 0.9
Other, excluding crib	+ 71.4	+209.7	+ 80.6
Total	+ 15.8	+ 19.0	+ 2.8
Foundations			
Spring	+ 17.1	+ 19.4	+ 1.9
Foam	- 7.0	- 1.9	+ 5.5
Other	- 0.6	+ 17.0	+ 17.7
Mattresses & foundations, total	+ 16.0	+ 18.9	+ 2.5

Source: National Association of Bedding Manufacturers, NABM Sales Trends Report, December 1983.

The U.S. bedding industry shipped 23.2 million pieces, worth $1.7 billion, in 1982 according to a survey by the National Association of Bedding Manufacturers. This is the first such industry survey since the Census Bureau ceased publication of their quarterly report at the end of 1980.

The value of conventional adult mattresses shipped by all U.S. producers, not only those classified in the industry, was $780 million in 1982. In units, 11.5 million were shipped in that year, 85% of which were innerspring mattresses. Foundations shipments were valued at $543 million with 8.8 million shipped; 77% had spring constructions.

Of the 1.1 million dual-purpose furniture pieces shipped in 1982, over 82% had a foam core.

SHIPMENTS

Bedding

Quantity & Value of Bedding Shipments, 1982

	Quantity (Mil. Units)	Value of Shipments (Mil. $)
Adult mattresses, conventional	11.5	$ 780
Foundations, all types	8.8	543
Crib mattresses	1.0	19
Dual-purpose furniture	1.1	328
Dual-purpose inserts (sold to others)	0.6	15
Sleep system ensembles (hybrids, electric beds, airbeds, incl. foundations)	0.2	64
Total	23.2	1,749

Source: National Association of Bedding Manufacturers.

Value of Shipments of Household Furniture & Bedding
By All U.S. Producers, 1980, 1981

	Value of Shipments (Mil. $)		% Change
	1981	1980	1981/1980
Wood household furniture, total	$ 5,220.3	$ 4,889.0	+ 6.8%
Living room, family room & den furniture	1,367.8	1,257.0	+ 8.8
Dining room, kitchen furniture, except cabinets	1,151.7	1,094.0	+ 5.3
Bedroom furniture	1,715.8	1,668.8	+ 2.8
Infants' & children's furniture	277.6	243.7	+ 13.9
Outdoor & unpainted, unassembled furniture	196.1	155.0	+ 26.5
Wood household furniture, n.s.k.	511.3	470.5	+ 8.7
Upholstered wood household furniture	3,562.5	3,330.6	+ 7.0
Metal household furniture, total	1,498.0	1,434.1	+ 4.5
Dining & dinette furniture	376.0	347.6	+ 8.2
Kitchen furniture	102.3	102.1	+ 0.2
Porch, lawn, outdoor & casual furniture	364.0	348.8	+ 4.4
Other metal household furniture	545.4	519.8	+ 4.9
Metal household furniture, n.s.k.	110.4	115.8	- 4.7

(continued)

Value of Shipments of Household Furniture & Bedding By All U.S. Producers, 1980, 1981

(continued)

	Value of Shipments (Mil. $) 1981	Value of Shipments (Mil. $) 1980	% Change 1981/1980
Mattresses & bedsprings, total	$ 2,220.3	$ 2,043.9	+ 8.6%
Innerspring mattresses, other than crib size	739.6	669.8	+ 10.4
Other mattresses, including crib mattresses	141.4	130.6	+ 8.3
Bedsprings, excluding innerspring units	561.7	508.5	+ 10.5
Convertible sofas	483.0	461.6	+ 4.6
All other dual-purpose sleep furniture	95.6	92.6	+ 3.2
Mattresses & bedsprings, n.s.k.	199.0	180.7	+ 10.1
Wood TV, radio, stereo & sewing machine cabinets	296.9	309.7	- 4.1

n.s.k. = not specified by kind.

Source: U.S. Bureau of the Census,
Annual Survey of Manufactures, 1981,
Value of Product Shipments M81(AS)-2.

Detailed information on furniture shipments is available only in the complete census of manufactures reports. Information from the 1982 census had yet to be released in early 1984, so the following information from the previous census, covering the year 1977, is the latest available on the quantity and value of shipments in detail. Information on bedding shipments follows on page 21.

Quantity & Value of Shipments of Household Furniture, by All Producers Detailed by Type, 1972, 1977

	Quantity (Thousands of Units)			Value (Millions of $)		
	1977	1972	% Change 1977/1972	1977	1972	% Change 1977/1972
Wood household furniture, total	na	na	--	$3,890.7	$2,716.8	+ 43.2%
Wood living room, library, family room & den furniture, except sewing machine cabinets	na	na	--	859.8	614.4	+ 39.9
Cabinets, including record, music etc., excl. sewing machine, radio, phono & TV cabinets	na	na	--	61.6	28.8	+113.9
Chairs, except dining room chairs	2,019.8	na	--	48.1	38.2	+ 25.9
Rockers	494.7*	293	+ 68.8%	23.4	6.9	+239.1
Tables, except card & phone tables	9,844.0	13,452	- 26.8	441.4	388.3	+ 13.7
Desks	535.8	502	+ 6.7	58.0	40.3	+ 43.9
Credenzas, bookcases & bookshelves	na	na	--	77.4	42.5	+ 82.1

Quantity & Value of Shipments of Household Furniture, by All Producers Detailed by Type, 1972, 1977

(continued)

	Quantity (Thousands of Units)			Value (Millions of $)		
	1977	1972	% Change 1977/1972	1977	1972	% Change 1977/1972
Other nonupholstered living room furniture	na	na	--	$ 90.7	$ 56.5	+ 60.5%
Wood living room, library, family room, & den furniture, except sewing machine cabinets, n.s.k.	na	na	--	59.2	12.9	+358.9
Wood dining room & kitchen furniture, except cabinets	na	na	--	962.3	603.6	+ 59.4
Tables, 30 x 40 inches or more, dining room	1,673.8*	1,894	- 11.6%	224.4	136.4	+ 64.5
Chairs, dining room	10,526.9*	11,392	- 7.6	375.6	251.2	+ 49.5
Buffets & servers, dining room	795.9	648	+ 22.8	132.5	74.1	+ 78.8
China & corner cabinets, dining room	588.7*	634	- 7.1	128.0	83.9	+ 52.6
Other dining & kitchen furniture	na	na	--	45.2	44.1	+ 2.5
Wood dining room & kitchen furniture, excl. cabinets, n.s.k.	na	na	--	56.6	13.9	+307.2
Wood bedroom furniture	na	na	--	1,290.3	1,029.2	+ 25.4
Beds, excl. headboards & headboard beds, bunk beds, cribs, cradles, Hollywood beds & youth beds	1,626.4*	1,638	- 0.7	110.3	62.2	+ 77.3
Headboards & headboard beds, incl. padded	3,553.9*	4,018	- 11.5	168.8	137.0	+ 23.2
Bunk beds, excl. mattresses & detachable springs	446.1*	936	- 52.3	30.4	33.6	- 9.5
Dressers, vanities & dressing tables	3,075.8*	4,147	- 25.8	343.9	328.1	+ 4.8
Wardrobes, chifforobes, armoires & wardrobe-type cabinets	204.7*	352	- 41.8	44.4	49.7	- 10.7
Chest of drawers	2,722.3*	3,788	- 28.1	226.2	226.5	- 0.1
Cedar chests	256.5	na	--	26.4	na	--
Night tables & stands	2,899.0*	3,763	- 23.0	135.5	118.2	+ 12.9
Other nonupholstered bedroom furniture	na	na	--	123.6	40.8	+202.9
Wood bedroom furniture, n.s.k.	na	na	--	82.8	na	--
Infants' & children's wood furniture	na	na	--	118.8	82.5	+ 44.0
Cribs, incl. springs sold as part of crib	na	1,174	--	47.7	28.8	+ 65.6
Play yards & play pens	107.3*	847	- 87.3	1.8	5.8	- 69.0
Other infants' & children's furniture	na	na	--	57.5	45.6	+ 26.1
Infants' & children's wood furniture, n.s.k.	na	na	--	11.8	2.3	+413.0

(continued)

SHIPMENTS

Quantity & Value of Shipments of Household Furniture, by All Producers Detailed by Type, 1972, 1977

(continued)

	Quantity (Thousands of Units)			Value (Millions of $)		
	1977	1972	% Change 1977/1972	1977	1972	% Change 1977/1972
Wood outdoor furniture, unpainted wood furniture & unassembled & knock-down wood furniture	na	na	--	$ 185.8	$ 107.9	+ 72.2%
Porch, lawn, beach & similar wood furniture: chairs, rockers, benches & chaise lounges, incl. steamer & deck chairs	2,468.7*	2,142	+ 15.2%	53.2	34.2	+ 55.5
Other wood porch, lawn, beach & similar furniture	na	na	--	24.3	26.1	- 6.9
Unpainted wood furniture (furniture-in-the-white):						
Chest of drawers	na	670	--	7.5	11.5	- 34.8
Other furniture-in-the-white, unpainted	na	na	--	42.9	16.3	+163.2
Unassembled or knock-down furniture, unpainted or finished, sold in kits	na	na	--	46.7	16.2	+188.3
Wood outdoor furniture, unpainted wood furniture & unassembled & knock-down wood furniture, n.s.k.	na	na	--	11.2	3.6	+211.1
Wood household furniture, n.s.k.	na	na	--	473.7	279.2	+ 69.7
Upholstered wood household furniture, total	na	na	--	2,735.7	1,990.5	+ 37.4
Sofa, davenports (excl. dual-purpose), settees & love seats excl. chairs sold as part of suites & sectional sofa pieces	6,729.1	6,752	- 0.3%	1,194.2	884.0	+ 35.1
Chairs, except reclining	5,077.8	7,721	- 34.2	469.4	478.6	- 1.9
Sectional sofa pieces, incl. pieces seating one person	801.4*	464*	+ 72.7	106.0	62.6	+ 69.3
Rockers, incl. swivel rockers	1,438.0*	1,811	- 20.6	120.6	102.8	+ 17.3
Reclining chairs, all types	3,504.8	3,288*	+ 6.6	352.9	248.5	+ 42.0
Other upholstered wood household furniture	na	na	--	99.4	62.6	+ 58.8
Upholstered household furniture, n.s.k.	na	na	--	393.2	191.4	+105.4
Metal household furniture, total	na	na	--	1,231.2	859.3	+ 43.3
Metal household dining, dinette & breakfast furniture	na	na	--	319.1	245.6	+ 29.9
Tubular metal, incl. chairs whether padded or plain:						
Sets (tables & chairs)	2,260.9	2,606	- 13.2	246.1	202.8	+ 21.3
Tables (not sold with a set)	675.3*	na	--	16.9	17.1	- 1.2
Chairs (not sold with a set)	923.7*	1,518	- 39.1	13.4	19.0	- 29.5

(continued)

SHIPMENTS

Quantity & Value of Shipments of Household Furniture, by All Producers Detailed by Type, 1972, 1977
(continued)

	Quantity (Thousands of Units)			Value (Millions of $)		
	1977	1972	% Change 1977/1972	1977	1972	% Change 1977/1972
Other metal dinette, dining & breakfast furniture	na	na	--	35.7	5.5	+549.1%
Metal household dining, dinette & breakfast furniture, n.s.k.	na	na	--	7.0	1.2	+483.3
Metal kitchen furniture	na	na	--	73.4	71.4	+ 2.8
Kitchen furniture, excl. breakfast furniture reported as "dining, dinette & breakfast furniture":						
Cabinets (base, top, base wall, utility, etc.)	na	na	--	49.6	40.4	+ 22.8
Stools, padded & plain	1,142.5	2,377	- 51.9%	17.2	25.3	- 32.0
Tables, incl. hostess carts	307.1	339*	- 9.4	5.5	4.0	+ 37.5
Metal kitchen furniture, n.s.k.	na	na	--	1.1	1.7	- 35.3
Metal porch, lawn, outdoor & casual furniture	na	na	--	275.9	177.1	+ 55.8
Tubular aluminum:						
Chairs, rockers, benches, chaise lounges & settees	11,304*	21,941	- 48.5	122.5	101.0	+ 21.3
Other tubular aluminum porch, lawn & outdoor furniture	na	na	--	29.2	9.7	+201.0
Cast & wrought iron:						
Chairs, rockers, benches, chaise lounges & settees	1,221.2	1,354	- 9.8	44.7	22.7	+ 96.9
Other cast & wrought iron porch, lawn & outdoor furniture	na	na	--	15.5	10.5	+ 47.6
Other metal porch, lawn, outdoor & casual furniture	na	na	--	37.4	19.5	+ 91.8
Metal porch, lawn, outdoor & casual furniture, n.s.k.	na	na	--	26.6	13.7	+ 94.2
Other metal household furniture	na	na	--	445.5	311.4	+ 43.1
Folding cots, rollable cots, army cots, & other metal beds	687.7*	1,176	- 41.5	15.6	18.3	- 14.7
Metal bed frames (with or without a headboard)	6,797.4*	9,615	- 29.3	77.8	52.8	+ 47.3
Upholstered metal household furniture	na	na	--	12.4	3.6	+244.4
Card tables & chairs	na	na	--	na	23.9	--
Medicine cabinets, incl. wall type & insert type	3,804.4*	3,586	+ 6.1	72.1	57.4	+ 25.6
Metal radio, phonograph, TV & hi-fi cabinets	295.4*	na	--	5.1	na	--

(continued)

SHIPMENTS

Quantity & Value of Shipments of Household Furniture, by All Producers
Detailed by Type, 1972, 1977
(continued)

	Quantity (Thousands of Units)			Value (Millions of $)		
	1977	1972	% Change 1977/1972	1977	1972	% Change 1977/1972
Infants' high chairs	985.2*	1,244	- 20.8%	$ 12.2	$ 11.4	+ 7.0%
Infants' car seats	1,051.3*	1,464	- 28.2	19.7	12.8	+ 53.9
Other infants' & children's metal furniture	3,066.5*	2,492	+ 23.1	47.6	24.5	+ 94.3
Other metal household furniture	na	na	--	108.9	65.6	+ 66.0
Other metal household furniture, n.s.k.	na	na	--	32.5	10.0	+225.0
Metal household furniture, n.s.k.	na	na	--	117.3	53.8	+118.0
Wood TV & radio cabinets, total	na	na	--	312.8	293.0	+ 6.8
Console phono cabinets & audio cabinets, incl. radio, phono & hi-fi cabinets	1,450.5	3,015	- 51.9	82.3	108.2	- 23.9
TV cabinets & combinations, TV, hi-fi, & radio	4,512.9	4,008	+ 12.6	171.6	147.4	+ 16.4
Sewing machine cabinets	651.5*	1,108	- 41.2	41.7	32.2	+ 29.5
Wood TV, radio & sewing machine cabinets, n.s.k.	na	na	--	17.7	5.2	+240.4
Household furniture, n.e.c., total	na	na	--	281.8	190.3	+ 48.1
Plastics & fibrous glass cabinets incl. radio, TV, phono, hi-fi & combinations	na	14,323.4	--	85.1	59.7	+ 42.5
Reed & rattan furniture, incl. willow, wicker & cane	na	na	--	42.4	21.5	+ 97.2
Other plastics & fibrous glass household furniture, excl. cabinets	na	na	--	87.3	80.8	+ 8.0
Other household furniture, except wood, metal, plastics or fibrous glass, incl. corrugated furniture	na	na	--	35.5	9.2	+285.9
Household furniture, n.e.c., n.s.k.	na	na	--	31.5	19.1	+ 64.9

na = not available
n.e.c. = not elsewhere classified.
n.s.k. = not specified by kind.
* = Indicates a portion of this total has been estimated by the Census Bureau.

Source: U.S. Bureau of the Census,
1977 Census of Manufactures,
Industry Series MC77-I-25A.

SHIPMENTS

Quantity & Value of Shipments of Bedding, by All Producers, Detailed by Type, 1972, 1977

	Quantity (Thousands of Units)			Value (Millions of $)		
	1977	1972	% Change 1977/1972	1977	1972	% Change 1977/1972
Mattresses & bedsprings, total	na	na	--	$1,481.5	$1,079.6	+ 37.2%
Innerspring mattresses, except crib size	9,638.1*	10,520	- 8.4%	492.6	336.6	+ 46.3
Other mattresses, incl. crib size	na	na	--	108.3	78.4	+ 38.1
Crib mattresses, all types	1,356.2*	1,735	- 21.8	17.9	16.4	+ 9.1
Latex foam core mattresses, other than crib size	184.5*	486	- 62.0	5.8	24.2	- 76.0
Urethane foam core mattresses, other than crib size	1,542.2	1,475	+ 4.6	59.7	24.0	+148.7
Other mattresses, other than crib size	na	675	--	6.9	11.7	- 41.0
Other mattresses, n.s.k.	na	na	--	18.0	2.1	+757.1
Bedsprings, total	na	na	--	360.6	277.8	+ 29.8
Box springs, with or without legs	6,566.0	9,022	- 27.2	282.1	263.2	+ 7.2
Other bedsprings	1,767.9*	754	+134.5	54.7	9.7	+463.9
Bedsprings, n.s.k.	na	na	--	23.8	4.9	+385.7
Convertible sofas, total	na	na	--	302.6	208.6	+ 45.1
Convertible sofas:						
From purchased mattresses, incl. interplant transfers	991.2	773	+ 28.2	211.8	122.0	+ 73.6
From mattresses produced at the same establishment	392.7	461	- 14.8	76.8	85.8	- 10.5
Convertible sofas, n.s.k.	na	na	--	14.0	0.8	+1,650.0
All other dual-purpose sleep furniture	na	na	--	31.8	56.4	- 43.6
Jacknife sofa beds & chair beds	270.2*	723	- 62.6	20.7	33.8	- 38.8
Studio couches	na	348	--	10.8	22.6	- 52.2
All other dual-purpose furniture, n.s.k.	na	na	--	0.3	--	--
Mattresses & bedsprings, n.s.k.	na	na	--	185.6	121.8	+ 52.4

na = not available.
n.s.k. = not specified by kind.
* = Indicates a portion of this total has been estimated by the Census Bureau.

Source: U.S. Bureau of the Census,
1977 Census of Manufactures,
Industry Series, MC77-I-25A.

PRODUCER PRICES

The producer (factory) price index for all household furniture categories rose at a 4.8% rate in the first three-quarters of 1983 compared with the 1982 annual index. This increase was more than twice as large as the change in the rate for all commodities. During this period, wood household furniture increased at the factory price level by 5.0%, dining room furniture rose 5.7%, bedroom furniture was up 4.9% and upholstered household furniture increased 4.4%. Producer prices for bedding products were 9.1% higher than in 1982.

Producer Price Indexes for Specified Furniture & Bedding,
1981, 1982 & January-to-September 1983
(1967 = 100 unless otherwise noted.)

	January-September 1983	% Change 9 months 1983/full year 1982	Annual Averages		
			1982	1981	% Change 1982/1981
All commodities	302.2	+ 1.0%	299.3	293.0	+ 2.1%
Household furniture	233.6	+ 1.6	229.8	219.2	+ 4.8
Wood household furniture	258.8	+ 2.5	252.6	240.6	+ 5.0
Living room furniture	242.8	+ 3.4	234.7	224.6	+ 4.5
Table	240.0	+ 2.6	234.0	224.3	+ 4.3
Desks (6/80=100)	115.6	+ 4.0	111.2	106.6	+ 4.3
Chairs (6/80=100)	123.6	--	na	na	--
Credenzas & bookcases (6/80=100)	121.6	+ 4.7	116.1	108.0	+ 7.5
Other nonupholsted living room furniture (6/80=100)	115.5	+ 2.2	113.0	107.9	+ 4.7
Dining room	278.8	+ 1.9	273.7	258.9	+ 5.7
Table	278.7	+ 2.1	272.9	255.8	+ 6.7
Chairs	294.7	+ 1.8	289.4	273.3	+ 5.9
Buffets & servers	259.9	+ 3.6	250.8	240.6	+ 4.2
China & corner cabinets	275.4	--	na	251.4	--
Other dining room & kitchen furniture (6/80=100)	115.8	+ 6.1	109.1	106.7	+ 2.2
Bedroom	254.3	+ 1.9	249.6	238.0	+ 4.9
Beds, except bunk	256.2	+ 1.8	251.7	235.3	+ 7.0
Headboard sets (6/80=100)	116.0	+ 2.3	113.4	108.2	+ 4.8
Dressers, vanities & dressing tables	252.5	+ 1.0	250.1	237.6	+ 5.3
Night tables & stands (6/80=100)	119.5	+ 3.5	115.4	108.8	+ 6.1
Chests	247.9	+ 1.8	243.6	233.5	+ 4.3
Wardrobes (6/80=100)	114.8	+ 1.7	112.9	107.0	+ 5.5
Other nonupholstered bedroom furniture (6/80=100)	117.3	+ 2.5	114.4	109.7	+ 4.3
Other wood household furniture (6/80=100)	110.4	+ 2.6	107.6	103.7	+ 3.8
Unpainted wood furniture (6/80=100)	116.5	+ 6.0	109.9	104.4	+ 5.3
Upholstered household furniture	212.4	+ 1.5	209.3	200.4	+ 4.4
Sofa	212.1	+ 1.0	209.9*	na	--
Chair	212.5	+ 1.6	209.1	na	--
Sofa bed, convertible	204.0	--	na	199.7	--
Other upholstered furniture (6/82=100)	103.3	--	na	na	--

(continued)

PRODUCER PRICES

Producer Price Indexes for Specified Furniture & Bedding
1981, 1982 & January-to-September 1983
(1967 = 100 unless otherwise noted.)
(continued)

	January-September 1983	% Change 9 months 1983/ full year 1982	Annual Averages		
			1982	1981	% Change 1982/1981
Metal household furniture	209.1	--	209.1	206.8	+ 1.1%
Porch & lawn furniture	299.3	+ 1.9%	293.7	280.7	+ 4.6
Bedding	180.8	- 10.5	202.1	185.2	+ 9.1
Mattress, innerspring	204.0	+ 0.7	202.6	184.9	+ 9.6

* May to December average.

Source: U.S. Bureau of Labor Statistics

FOREIGN TRADE

U.S. imports of furniture (including office furniture) and bedding jumped 30% in 1983 to an estimated $1.4 billion compared with $1.1 billion in 1982, according to the Bureau of Industrial Economics. Imports from Canada, Denmark, Taiwan and Yugoslavia accounted for about two-thirds of this total. An increasing amount of knock-down furniture and parts from Taiwan and Yugoslavia for assembly into finished products in U.S. plants was mainly responsible for the gain in import value, according to the BIE. Imports of wooden furniture, other than chairs and parts, increased 35% over 1982 to $553 million.

Exports of household furniture and bedding declined 11% in value to about $225 million in 1983, an estimated 2% of domestic production. This drop reflected the low levels of consumer spending in Canada and decreasing trade with Saudi Arabia, the major U.S. furniture export markets. Furniture and bedding exports to these two countries represent about half of the U.S. total.

Value of Imports & Exports of Furniture & Bedding, 1980-1983
(Million $)

	1983(e)	1982(e)	1981	1980	% Change 1983/1982	Compound Annual Growth Rate 1972-1983
Furniture & bedding						
Imports	$1,440	$1,110	$989	$846	+ 29.7%	+ 19.4%
Exports	225	253	280	218	- 11.1	+ 19.4

Source: U.S. Bureau of Industrial Economics
1984 U.S. Industrial Outlook

THE POTENTIAL MARKET

According to the U.S. Current Population Survey (CPS), there were 83.9 million households in the U.S. as of March 1983, 391,000 more than in 1982. This marked the first time in 20 years that there was no statistically significant increase in the number of households in a year-to-year comparison. The average net annual increase for the 3-year period since 1980 was about 1 million households a year.

Since the completion of the March 1983 CPS, the number of new household formations has risen substantially. In the April to July 1983 period, an estimated 300,000 households were formed. Chase Econometrics projected that the number of new households will approach a record 2 million in the 12 months ended March 1984.

Number of U.S. Households by Type, 1980-1983
(In thousands as of March of each year)

	1983	1982	1981	1980	% Change 1983/1981
Households, total	83,918	83,527	82,368	80,776	+ 1.9%
Family households, total	61,393	61,019	60,309	59,550	+ 1.8
Nonfamily households, total	22,525	22,508	22,059	21,226	+ 2.1
Living alone	19,250	19,354	18,936	18,296	+ 1.7
Average household size (number)	2.73	2.72	2.73	2.76	

Source: U.S. Bureau of the Census,
Households, Families, Marital Status and Living Arrangements: March 1983
P-20 No. 382.

As part of the general economic recovery in the U.S. in 1983, housing starts climbed 60.3% over the depressed 1982 level to 1.7 million units. The number of housing permits authorized, a harbinger of future housing activity, grew almost 60% in 1983. Even so, some analysts feel that the official figures understate the development of new housing because they do not consider "adaptive use" housing, where a building formerly used for another use (for example, a school or factory) is converted into apartments or condominiums. This new housing innovation contributed perhaps 500,000 units to the housing stock in 1983.

Total single-family housing starts in 1983 were 1.1 million units, up 61% over 1982. Starts of homes with five or more units rose 63% to 521,000. In 1984, housing starts are expected to repeat their 1983 performance, with somewhere between 1.6 million and 1.7 million units started.

Of course, the higher level of completed housing construction creates a demand for furniture and bedding products. According to industry surveys, people who move account for approximately a quarter of furniture and bedding sales.

THE POTENTIAL MARKET

U.S. Privately-Owned Housing Activity, 1981-1983
(Thousands of Units)

	1983(p)	1982	1981	% Change 1983/1982
Housing starts	1,703.1	1,062.2	1,084.2	+ 60.3%
Housing permits authorized	1,596.8	1,000.5	985.5	+ 59.6
New housing sales	625.0	412.0	436.0	+ 51.7
Housing resales	2,704*	1,990.0	2,419.0	+ 35.9

* Estimate

Source: U.S. Bureau of the Census,
Construction Reports Division;
National Association of Realtors

PERSONAL CONSUMPTION EXPENDITURES

Personal consumption expenditures for furniture and bedding in 1982 amounted to $19.1 billion, a 3.5% decrease from expenditures of $19.8 billion in 1981. These expenditures cover the value at retail of goods reaching the consumer through all channels, including direct sales by manufacturers or wholesalers, etc.

Total U.S. personal consumption expenditures over the same time period rose 7.2% to $1,992 billion from $1,857.2 billion in 1981. Thus, furniture and bedding's share of total expenditures dropped to 1.0% in 1982 compared with 1.1% the previous year.

U.S. Personal Consumption Expenditures &
Share Accounted For By Furniture & Bedding, 1979-1982
(Billions of Dollars)

					% Change	
	1982(p)	1981	1980	1979	1982/1981	1982/1979
Personal consumption expenditures:						
U.S. total	$1,991.2	$1,857.2	$1,668.1	$1,507.2	+ 7.2%	+32.1%
Furniture & bedding	19.1	19.8	18.6	18.2	- 3.5	+ 4.9
% of U.S. total	0.9%	1.07%	1.11%	1.21%		

(p) = preliminary.

Source: U.S. Department of Commerce,
Office of Business Economics.

RETAIL SALES BY STORE TYPE

In 1982, furniture and department stores sold furniture worth an estimated $17.8 billion at retail, according to the National Association of Furniture Manufacturers. This figure does not include sales in catalog showrooms, variety stores or via mail order.

The following table breaks out furniture sales by manufacturers' invoice value, which totaled $9.1 billion in 1982, 4.8% lower than the previous year.

Estimated Sales of Selected Furniture Categories
In Furniture & Department Stores
(Millions of Dollars in Manufacturers' Invoice Value)

	Total		Furniture Stores		Department Stores	
	1982	1981	1982	1981	1982	1981
Furniture categories:						
Upholstered furniture	$3,447.2	$3,593.4	$2,648.6	$2,839.7	$ 798.5	$ 753.7
Case goods, total	3,006.5	3,278.9	2,321.8	2,598.6	684.7	680.3
Dining room	1,299.2	1,401.2	1,000.5	1,107.5	298.7	293.7
Bedroom	1,707.3	1,877.7	1,321.3	1,491.1	386.0	386.6
Tables	1,300.2	1,324.7	999.8	1,045.7	300.5	279.0
Dual-purpose sleep furniture	663.7	556.9	519.2	445.6	144.5	111.3
Summer & casual furniture	192.2	**	144.4	**	47.8	**
Other household furniture	499.2	814.3	371.6	625.7	127.6	188.7
Total invoice value	9,109.1	9,568.3	7,005.5	7,555.3	2,103.6	2,013.0

* Includes invoice value of kitchen, dinette & juvenile furniture.
**Included in "Other household furniture" category.

Source: National Association of Furniture Manufacturers, Sales Planning Guide, 1983

The 1977 Census of Retail Trade, U.S. Bureau of the Census, contains the latest official information on retail sales of furniture and bedding. Sales information was obtained only from stores with payrolls, but not all store types were required to break out sales by merchandise category. The following table reflects sales of furniture and bedding in the major outlet types which did separately report on this category.

Reported sales of furniture and bedding totaled $14.7 billion in 1977. Furniture stores sales accounted for $10.8 billion, or 73.5% of the total. An additional $2.6 billion in sales came from department store sales in 1977.

Living room, dining room and bedroom furniture accounted for more than half of furniture and bedding sales in department stores, and more than three-quarters of sales in furniture stores.

RETAIL SALES BY STORE TYPE

Reported Sales of Furniture & Bedding by Store Type, 1977
(Includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number*	% of Total	Mil. $	% of Total
Total reported	72,389	100.0%	$14,684.6	100.0%
Department stores**	6,736	9.3	2,598.4	17.7
Furniture stores	31,320	43.3	10,790.4	73.5
All other retail outlets	34,333	47.4	1,295.8	8.8

* Each business location is separately counted as a store unit, including each unit in a multi-unit organization.

** Includes discount department stores as well as traditional department stores. Sales of catalog order desks within these stores are included in the department store data, but not sales of catalog headquarters operations, which are included in the mail order house data.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales RC 77-L.

Furniture Stores

Through the first 10 months of 1983, furniture store sales were slightly less (-0.2%) than 1982 sales through October. Furniture store sales fell 4.7% in 1982 compared to 1981 to $17.8 billion, virtually on a par with 1979 sales.

Between 1979 and 1981, the number of furniture stores (with payrolls) declined by 1,691 units to 28,342, according to County Business Patterns.

Furniture Stores: Number of Stores & Total Sales, 1979-1982

	1982	1981(r)	1980	1979	% Change	
					1982/1981	1982/1979
Sales (mil. $)	$17,813	$18,685	$18,028	$17,829	- 4.7%	- 0.1%
Number of stores*	na	28,342	29,070	30,033	--	--

na = not available (r) = revised
* Includes only establishments with payrolls.

Source: U.S. Bureau of the Census,
Revised Monthly Retail Sales BR-13-82S;
County Business Patterns, 1979-1981

RETAIL SALES BY STORE TYPE

Furniture Stores

Seasonal Pattern in Furniture Store Sales:
Percent of Year's Sales by Month, 1981, 1982

Year	Total	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
1982	100.0%	7.4%	7.2%	8.2%	8.2%	8.3%	8.5%	8.5%	8.3%	8.0%	8.4%	9.0%	9.8%
1981	100.0	8.0	7.5	8.3	8.4	8.6	8.9	8.4	8.6	8.0	8.1	8.2	8.9

Source: Based on U.S. Bureau of the Census, Revised Monthly Retail Sales BR-13-82S.

According to Inside Furniture/HFD-Retailing Home Furnishing's annual compilation of the top 100 furniture stores, specialty stores did better than multi-product furniture stores, in general, in 1982. The largest sales gain of any store in the top 100 was registered by Scandinavian Design, up 41% from 1981. Levitz, by far the largest furniture chain in the U.S., dropped 0.5% to $485.6 million in sales in 1982.

The 25 Leading Furniture Retailers, 1981, 1982

	Sales (Mil. $)			Number of Stores	Sales Per Square Foot
	1982	1981	% Change 1982/1981	1982	1982
1. Levitz	$ 485.6	$ 488.0	- 0.5%	78	$ 112
2. Breuner's	135.0	135.0	--	16	na
3. W.S. Badcock	132.0*	120.0	+ 10.0	189	na
4. Haverty's	125.1	122.5	+ 2.1	65	na
5. Wickes	105.0	150.0	- 30.0	15	na
6. Reliable Stores	100.0	82.0*	+ 21.9	73	na
7. Rhodes	100.0	88.6	+ 12.9	50	81
8. Heilig Meyers	95.3	76.6	+ 24.4	82	64
9. RB Furniture	94.4	90.5	+ 4.3	77	78
10. Nebraska Furniture Mart	90.5	82.0	+ 10.4	1	402
11. Leath-Maxwell	90.0*	104.0*	- 13.5	na	na
12. Finger's	80.0	70.0	+ 14.3	6	na
13. McMahan's, Santa Monica, Ca.	65.0*	65.0	--	42	na
14. Seaman's	64.0*	57.0	+ 12.3	na	na
15. Barrows	61.0*	55.0	+ 10.9	na	na
16. Value City	60.0	55.0	+ 9.1	25	100
17. McMahan's, Carlsbad, Ca.	56.0*	56.0*	--	na	na
18. Huffman Koos	56.0*	60.0*	- 6.7	11	93*
19. J.M. Smyth/Homemakers	55.0	75.9*	- 27.5	11	116
20. Barker Brothers	50.0	52.0*	- 3.8	16	84
21. Alperts	50.0*	52.0*	- 3.8	10	143*
22. Scandanavian Design	44.5	31.5	+ 41.3	23	377
23. W & J Sloane	40.0*	60.0*	- 33.3	na	na
24. Sterchi Bros.	38.4	41.5	- 7.5	73	na
25. Hayne Furniture	36.0*	36.0*	--	na	na

* Estimated.

na = not available.

Source: Inside Furniture/HFD-Retailing Home Furnishings, May 1983.

RETAIL SALES BY STORE TYPE

Furniture/Home Furnishings Stores

Upholstered living room furniture accounted for 21.9% of sales in the typical home furnishings store in 1982, according to a survey conducted by the National Home Furnishings Association among its member stores. In total, living room furniture provided the typical store with 42.2% of its volume. Bedroom furniture accounted for 12.0%, dining room furniture for 9.5% and bedding, 7.1%.

The median home furnishings store in the 1982 survey had 21,000 square feet of space, of which 77% is used as the selling floor. About 50% of the selling space is devoted to living room furniture.

Operating Ratios of Furniture Departments
In Home Furnishings Stores & Furniture Stores, 1982
(Median Results)

	Home Furnishings Stores, Total		Furniture Stores	
	% of Selling Space	Sales Per Square Foot of Selling Space	% of Selling Space	Sales Per Square Foot of Selling Space
Living room furniture:				
Upholstered	27.4%	$ 54.05	29.9%	$ 56.25
Dual-purpose	6.9	48.85	7.5	66.67
Occasional	9.5	62.81	10.6	95.47
Recliners	6.4	63.62	7.5	67.87
Dining room furniture	11.8	57.98	12.4	71.25
Bedroom furniture	17.3	51.67	16.4	66.55
Bedding	5.9	76.48	6.2	88.91
Kitchen/dinette	4.7	31.10	4.0	61.97
Floorcoverings	3.6	93.77	2.0	80.23
Appliances	1.9	132.57	0.4	80.29
Other	4.9	147.49	3.1	190.32
Total	100.0	67.09	100.0	78.11

Source: National Home Furnishings Association, "1982 Operating Experiences Report" CompetitiveEdge, August 1983.

Department Stores

Sales in the furniture and bedding departments of the typical department store with sales over $1 million fell 0.9% in 1982, according to the annual Merchandising & Operating Results report released by the National Retail Merchants Association. In 1982, the median sales for all upstairs departments in the 103 stores surveyed increased 3.8%. While sales per square foot in the furniture and bedding departments were at a median $50.00, they reached a typical $109.00 for the upstairs store as a whole.

RETAIL SALES BY STORE TYPE

Department Stores

Selected 1982 Merchandising & Operating Results in Furniture & Bedding Departments in Department Stores with Sales Over $1 Million
(Median Results)

	Furniture & Bedding Total (70)*	Upholstered Furniture (50)*	Case Goods (43)*	Dual-Sleep Bedding & Other Sleep Furniture (58)*	All Other Furniture (28)*
Net sales, % change from last year	- 0.9%	+ 1.3%	- 5.7%	+ 3.4%	- 6.8%
Sales, % of merchandising division**	46.1	15.3	9.7	13.9	6.0
Sales, % of total store	4.5	1.6	0.9	1.4	0.6
Cumulative markon, %	47.8	48.1	48.6	46.9	50.2
Gross margin, % of net sales	40.8	41.0	37.7	43.5	41.2
Markdowns, % of net sales	13.3	13.0	15.2	9.2	17.2
$ sales per sq. ft. of selling space (main or largest selling unit)	$50.0	$40.0	$35.0	$91.0	$27.1
Number of stock turns (times)	1.9	2.3	1.2	3.8	1.2

* Number in parentheses represents the number of reporting companies in each category.

** Merchandise division for furniture & bedding is furniture & decorative accessories.

Source: National Retail Merchants Association, Merchandising & Operating Results of 1982.

The 20 Leading Department Stores in Furniture Sales, 1981, 1982
(Estimated)

		Furniture Sales (Mil. $)			% to Total Store Sales
		1982	1981	% Change 1982/1981	1982
1.	Macy's New York	$ 62	$ 58	+ 6.9%	7%
2.	Bamberger's	60	56	+ 7.1	8
3.	Burdine's	38	38	--	7
4.	Macy's California	37	35	+ 5.7	6
5.	Bloomingdale's	36	40	- 10.0	6
6.	Foley's	34	32	+ 6.2	6
7.	Abraham & Straus	30	24	+ 25.0	5
8.	May Co. - California	28	27	+ 3.7	5
9.	Marshall Field	27	25	+ 8.0	4
10.	The Broadway	26	26	--	4
11.	The Bon	25	25	--	7

(continued)

RETAIL SALES BY STORE TYPE

The 20 Leading Department Stores in Furniture Sales, 1981, 1982
(Estimated)
(Continued)

		Furniture Sales (Mil. $)			% to Total Store Sales
		1982	1981	% Change 1982/1981	1982
12.	Dayton's	25	23	+ 8.7%	6%
13.	Hecht's	24	24	--	6
14.	Rich's	23	20	+ 15.0	6
15.	Emporium Capwell	22	24	- 8.3	4
16.	Maas Bros.	22	22	--	8
17.	Woodward & Lothrop	21.6	21	+ 2.9	6
18.	Jordan Marsh, Boston	21	20	+ 5.0	5
19.	Robinson's	21	18	+ 16.7	6
20.	Bullock's	21	22	- 4.5	4

Source: Inside Furniture/HFD-Retailing Home Furnishings, May 1983

Sleep Shops

With 1982 sales of about $24 million in 63 outlets, Ortho Mattress of Rancho Dominquez, Ca. was the largest operator of sleep shops in the U.S., according to a HFD-Retailing Home Furnishings survey.

The Top 25 Sleep Shops, 1982

	Sales (e) (Mil. $)	Number of Stores
1. Orthos Mattress, Rancho Dominquez, Ca.	$ 24	63
2. Hillside Bedding, Mt. Vernon, N.Y.	21	53
3. Mattress Discounters, Arlington, Va.	20	27
4. Mattress Warehouse, Akron, Oh.	20	37
5. Kleinsleep, Yonkers, N.Y.	19.7	14
6. Sleepy's, New Hyde Park, N.Y.	18.5	24
7. Sleep Country, Dallas, Tx.	16	8
8. City Mattress, Buffalo, N.Y.	15	11
9. American Bed Co., Houston, Tx.	14.5	17
10. Slumberland, St. Paul, Mn.	13.4	15
11. Stevens, Chicago, Il.	12	20
12. Royal Mattress, Atlanta, Ga.	11	8
13. Bed City, New York	10	28
14. W. Simmons, Cerritos, Ca.	7.5	14
15. Colony, Hackensack, N.J.	5.5	6
16. Sleep-O-Rama, Margate, Fla.	5.2	8
17. Off-Track Bedding, East Providence, R.I.	4.5	6

(continued)

RETAIL SALES BY STORE TYPE

Sleep Shops

The Top 25 Sleep Shops, 1982
(continued)

	Sales (e) (Mil. $)	Number of Stores
18. Siesta, Stoughton, Ma.	4.5	15
19. Sleep Quarters, Norfolk, Va.	3.5	5
20. Nationwide, Philadelphia, Pa.	3.5	6
21. Mattress Fair, Hatfield, Pa.	3.5	7
22. Sleep World, Woodbridge, N.J.	3	3
23. Mattress Discounters, Dallas, Tx.	3	3
24. Sleep Scene, Orlando, Fla.	2	3
25. Sleep World, Miami, Fla.	2	3

(e) = estimated.

Source: HFD-Retailing Home Furnishings, June 20, 1983

CONSUMER PRICE INDEX

Consumer Price Indexes for Specified Furniture & Bedding Items 1981-1983

(1967 = 100 unless otherwise specified)

	Annual Averages			% Change	
	1983(p)	1982	1981	1983/1982	1983/1981
All items	298.4	289.1	272.4	+ 3.2%	+ 9.5%
Furniture & bedding	218.5	213.2	204.7	+ 2.5	+ 6.7
Bedroom furniture (1977 = 100)	151.6	143.6	135.0	+ 5.6	+ 12.3
Sofas (Dec. 1977 = 100)	118.2	117.8	117.0	+ 0.3	+ 1.0
Living room chairs & tables (Dec. 1977 = 100)	123.8	121.8	116.9	+ 1.6	+ 5.9
Other furniture (Dec. 1977 = 100)	141.4	140.0	134.5	+ 1.0	+ 5.1

(p) = preliminary

Source: U.S. Department of Labor, Bureau of Labor Statistics.

RETAIL ADVERTISING

Percent of Year's Total Newspaper Advertising Linage Done By Retailers Each Month, 1982

Month	Bedroom Sets	Dinette Sets	Dining Room Sets	Living Room Sets	Living Room Chairs	Mattresses	Sofas & Sectionals	Studio Couches & Sofabeds
January	11.0%	9.2%	8.5%	10.5%	7.7%	10.3%	9.0%	9.9%
February	9.4	10.7	9.4	9.4	8.0	8.4	9.3	9.4
March	8.6	8.3	9.2	9.1	7.6	8.3	7.7	9.0
April	9.2	7.0	7.6	8.1	7.9	7.4	8.0	7.9
May	9.8	9.4	9.5	10.2	9.4	9.5	9.3	11.7
June	7.5	7.0	5.3	7.9	8.0	7.3	7.3	6.9
July	8.2	8.1	7.5	8.2	7.4	8.3	8.2	6.8
August	9.6	9.1	7.7	10.5	8.2	9.4	10.1	7.7
September	7.8	9.2	8.2	7.1	7.2	9.0	8.5	9.5
October	7.9	8.4	11.0	6.9	8.3	9.7	9.6	8.5
November	7.1	8.6	11.1	7.1	10.2	7.8	8.4	8.6
December	3.9	5.0	5.0	5.0	10.1	4.6	4.6	4.1

Source: The Advertising Checking Bureau, Inc.-
Neustadt Reports Division, covering retail newspaper advertising linage in seven cities: Chicago, Philadelphia, Cincinnati, Dallas, Cleveland, Los Angeles & Washington, D.C.

FURNITURE STYLES/MATERIALS

One-third more bedroom and dining room suites were shown at the October 1982 Southern Furniture Market than at the same market a year ago, according to the Fine Hardwoods-American Walnut Association. Little change in composition or style was noted between the two shows. The Association did, however, detect an upgrading trend in low-end lines as manufacturers replaced more plastic and vinyl with hardwoods of the less-expensive species, such as beech, birch and elm.

Survey of Bedroom/Dining Room Suites & Modular Wall Units At the Southern Furniture Market, October 1981, 1982

	October 1982		October 1981	
	Number of Suites	% of Total	Number of Suites	% of Total
BEDROOM/DINING ROOM SUITES	2,664	100.0%	1,981	100.0
By Woods & Materials				
Oak	676	25.4	435	22.0%
Pine	384	14.4	269	13.5
Cherry	285	10.7	150	7.6
Pecan	197	7.4	164	8.3
Maple	162	6.1	147	7.4
Mahogany	123	4.6	108	5.4

(continued)

Survey of Bedroom/Dining Room Suites & Modular Wall Units At the Southern Furniture Market, October 1981, 1982
(continued)

	October 1982		October 1981	
	Number of Suites	% of Total	Number of Suites	% of Total
By Woods & Materials (cont'd.)				
Ash	68	2.6%	58	2.9%
Walnut	65	2.4	43	2.2
European Ash Burl	41	1.5	22	1.1
Elm	31	1.2	19	1.0
Primavera	25	0.9	19	1.0
Beech	22	0.8	12	0.6
Birch	13	0.5	14	0.7
Other woods	77	3.0	66	3.3
Print	269	10.1	224	11.3
Paint	160	6.0	157	7.9
Plastic/vinyl	25	0.9	51	2.6
Brass/glass, etc.	41	1.5	23	1.2
By Styles				
Colonial & Early American	905	34.0	486	24.5
Contemporary*	836	31.4	649	32.8
English Traditional	379	14.2	242	12.2
French Provincial	165	6.2	190	9.6
Italian	107	4.0	55	2.8
American Traditional	67	2.5	190	9.7
Spanish	67	2.5	30	1.5
French Country	60	2.3	47	2.3
English Country	45	1.7	76	3.8
French Court	19	0.7	16	0.8
American Ranch	14	0.5	--	--

* Includes transitional, modern & modern Oriental styles

Source: Fine Hardwoods-American Walnut Association (Nov. 1983)

Due to changes in the survey procedure effective with the 1982 shows, the composition and styling of modular wall units shown at the October 1982 show can only be compared with the April 1982 show.

FURNITURE STYLES/MATERIALS

Survey of Modular Wall Units At the Southern Furniture Market
April, October 1982

	October 1982		April 1982	
	Number at Show	% of Total	Number at Show	% of Total
MODULAR WALL UNITS	542	100.0%	543	100.0%
By Woods & Materials				
Oak	148	27.3	121	22.3
Pine	54	10.0	58	10.7
Cherry	42	7.7	34	6.3
Pecan	37	6.8	31	5.7
Walnut	22	4.0	38	7.0
Mahogany	16	3.0	15	2.8
European Ash Burl	14	2.6	nr	nr
Maple	10	1.8	nr	nr
Ash	9	1.7	22	4.0
Primavera	9	1.7	12	2.2
Other woods	31	5.7	26	4.8
Print	72	13.3	28	5.2
Paint	38	7.0	21	3.9
Plastic/vinyl	26	4.8	89	16.4
Brass/glass, etc.	14	2.6	48	8.8
By Styles				
Contemporary	345	63.6	373	68.7
Colonial & Early American	70	12.9	35	6.4
English Traditional	57	10.5	49	9.0
Italian	16	3.0	32	5.9
French Provincial	15	2.8	18	3.3
American Traditional	14	2.6	12	2.2
English Country	9	1.7	9	1.7
French Country	7	1.3	5	0.9
Spanish	4	0.7	9	1.7
American Ranch	3	0.5	nr	nr
French Court	2	0.4	1	1.2

nr = not reported.

Source: Fine Hardwoods-American Walnut Association
(November 1983)

CONSUMER BUYING HABITS

Of the 416 consumers polled in the May 1983 Better Homes & Gardens annual survey, 55% intended to decorate or redecorate their living quarters in the year following the survey. More than three-quarters of the respondents shopped stores to get decorating ideas and 65% watched local newspapers for sales. Only 22% believed brand names were very important in determining the quality of furniture, although 51% thought they were somewhat important.

CONSUMER BUYING HABITS

Country (casual) furniture was preferred by 45.2% of the respondents, up from 27.3% in the 1982 survey. The popularity of modern/contemporary furniture also jumped in the year between surveys, with only 14.9% noting it as a preference in 1982.

Preferred Furniture Styles, 1983

	% of Respondents*
Country (casual)	45.2%
Traditional	35.8
Early American	29.8
Modern/Contemporary	23.6
Turn of the Century American	12.7
French Provincial	9.9
Formal English/French	9.1
Oriental	9.1
Mediterranean/Spanish	7.7
Italian Provincial	3.6
Eclectic (mixture)	28.8

* Total does not add to 100% due to multiple responses.

Price Panel Members Would Be Likely To Pay
For a Dining Room Suite or a Master Bedroom Suite

	% of Respondents	
	Dining Room Suite	Master Bedroom Suite
Under $1,000	5.8%	14.7%
$1,000 - $1,999	27.2	44.3
$2,000 - $2,999	31.0	22.1
$3,000 - $3,999	22.4	13.5
$4,000 or more	11.7	4.0

Price Panel Members Would Be Likely To Pay For a Sofa

	% of Respondents
Under $500	11.5%
$500 - $749	37.0
$750 - $999	31.5
$1,000 - $1,999	15.9
$2,000 or more	2.4

The majority of panel members (60.1%) would like to see more smaller scale furniture available to fit smaller rooms.

CONSUMER BUYING HABITS

Type of Small Scale Furniture Panel Members Would Like To See

	% of Respondents*
Wall storage systems	57.6%
Dining furniture (buffets, chinas, etc.)	55.6
Upholstered chairs	51.6
Sofas	46.8
End tables/occasional tables	44.0
Dining room tables	30.0
Cocktail/coffee tables	33.6
Chest of drawers	30.4
Beds	12.0

* Total does not add to 100% due to multiple responses.

In an earlier BH & G/Inside Furniture survey, 436 members of the Consumer Panel told what pieces of living room and bedroom furniture they had purchased in 1981 and/or 1982. More than a quarter of the respondents bought a bed in 1982 and a fifth purchased a living room sofa. The following tables give in detail the percentage of panel members who bought furniture items for these rooms.

Percent of Panel Members Who Bought Specified Living Room Furniture In 1981 or 1982

	Bought In:	
	1982	1981
Sofa	20.4%	29.1%
Settee/loveseat	10.3	15.5
Convertible sofa	12.2	16.2
Upholstered chair	16.7	25.5
Non-upholstered chair	3.7	4.7
Commode/cabinet	3.2	5.8
End table/occasional table	20.0	29.1
Coffee/cocktail table	13.5	na
Bar/liquor cabinet	2.1	1.1
Game table	3.0	2.5
Wall storage system	7.6	10.1
Reclining chair (rocking type)	7.3	10.4
Reclining chair (non-rocking type)	9.9	12.6

na = not available

CONSUMER BUYING HABITS

Percent of Panel Members Who Bought Specified Bedroom Furniture In 1981 or 1982

	Bought In: 1982	Bought In: 1981
Bed	26.1%	34.9%
Chest of drawers	18.6	19.8
Dresser	12.8	18.3
Cedar chest/chest	1.1	0.7
Armoire	2.1	3.2
Night table	9.9	14.0
Bookcase	9.4	6.1
Desk	9.6	8.3
Non-upholstered chair	6.2	6.8
Upholstered chair (not reclining)	5.3	5.8
Reclining chair (rocking type)	3.4	1.4
Reclining chair (non-rocking type)	3.0	2.2

Source: Inside Furniture/HFD-Retailing Home Furnishings
November 29, 1982

A recent survey commissioned by Simmons USA revealed that each year one out of every eight U.S. households goes into the bedding market. Survey indications are that couples shopping together for bedding account for 44% of bedding shoppers, females shopping alone and males by themselves represent 34% and 17%, respectively, and the remaining 5% of shoppers are other combinations of persons.

Place of Purchase of Bedding

	% of Purchasers
Furniture stores	44%
Department stores	15
National chains (Sears, Penneys, Wards)	12
Bedding stores	8
Discount stores	3
Other	18

What Purchasers Look For in Bedding

	% of Purchasers
Comfort	96%
Durability	87
Construction features	82
Brand	70
Warranty	70
Price	53

FAIRCHILD FACT FILES AVAILABLE FOR 1984

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends. (1983 Edition available now -- 1984 Edition will be available in February, 1985)

DEPARTMENT STORE SALES: Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sale information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1983 Edition available now -- 1984 Edition will be available in January, 1985)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data. (November)

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and buying habits. ($15.00) (1983 Edition available now -- 1984 Edition will be available in July, 1984)

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered. (October)

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics. (May)

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included. (May)

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits.

PERSONAL ELECTRONICS: A statistical summary of the market for electronic equipment designed for individuals. Product categories include televisions, radios, stereos, personal stereos, home computers, videosystems and videogames. Data is presented on both the manufacturer and the retailer level. Also includes a section on consumer buying habits. (Special Fact File for 1983, $15.00)

RETAILING/MERCHANDISING TRENDS: Covers trends in sales of specific retail outlet types, competitive developments in retailing (such as off-price retailing, franchising, designer names, private labels). Trends in number of outlets by size; regional developments in retailing. (December)

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and in physical fitness. (Special Fact File for 1984, $15.00) (July)

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label. (September)

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery.

TOILETRIES, COSMETICS, FRAGRANCES AND BEAUTY AIDS: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers. (March)

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